



imparta[®]

Account Troubleshooter

The 3D Advantage Account Troubleshooter

What is the 3D Advantage®

The 3D Advantage is based on more than 20 years of sales research and experience with global sales teams. It builds skills across the three dimensions that are necessary for successful selling: Insight, Influence and Trust.

“Imparta’s 3D Advantage® distils over 20 years of research into the definitive model of remarkable selling.

A three-dimensional salesperson, somebody who combines Insight, Influence and Trust, will always outsell a one or two-dimensional salesperson.

It’s this 3D advantage that can help your business to survive and thrive, particularly in times of economic uncertainty.”

Richard Barkey
CEO & Founder of Imparta



INSIGHT

The degree to which salespeople create value through disruptive, specific insights into a customer’s needs, solutions and decision process.



INFLUENCE

How well salespeople achieve desired outcomes within the account, through the ethical use of behavioural science, psychology, and strategy.



TRUST

The extent to which salespeople demonstrate their value to a customer, and their focus on the customer’s success, in order to gain access to conversations where they can deliver insight and influence.

What is the 3D Advantage® Account Troubleshooter?

Use the interactive 3D Advantage® Account Troubleshooter to identify the typical issues throughout the buying cycle, the skill areas required to overcome them and the aligned Imparta training module.

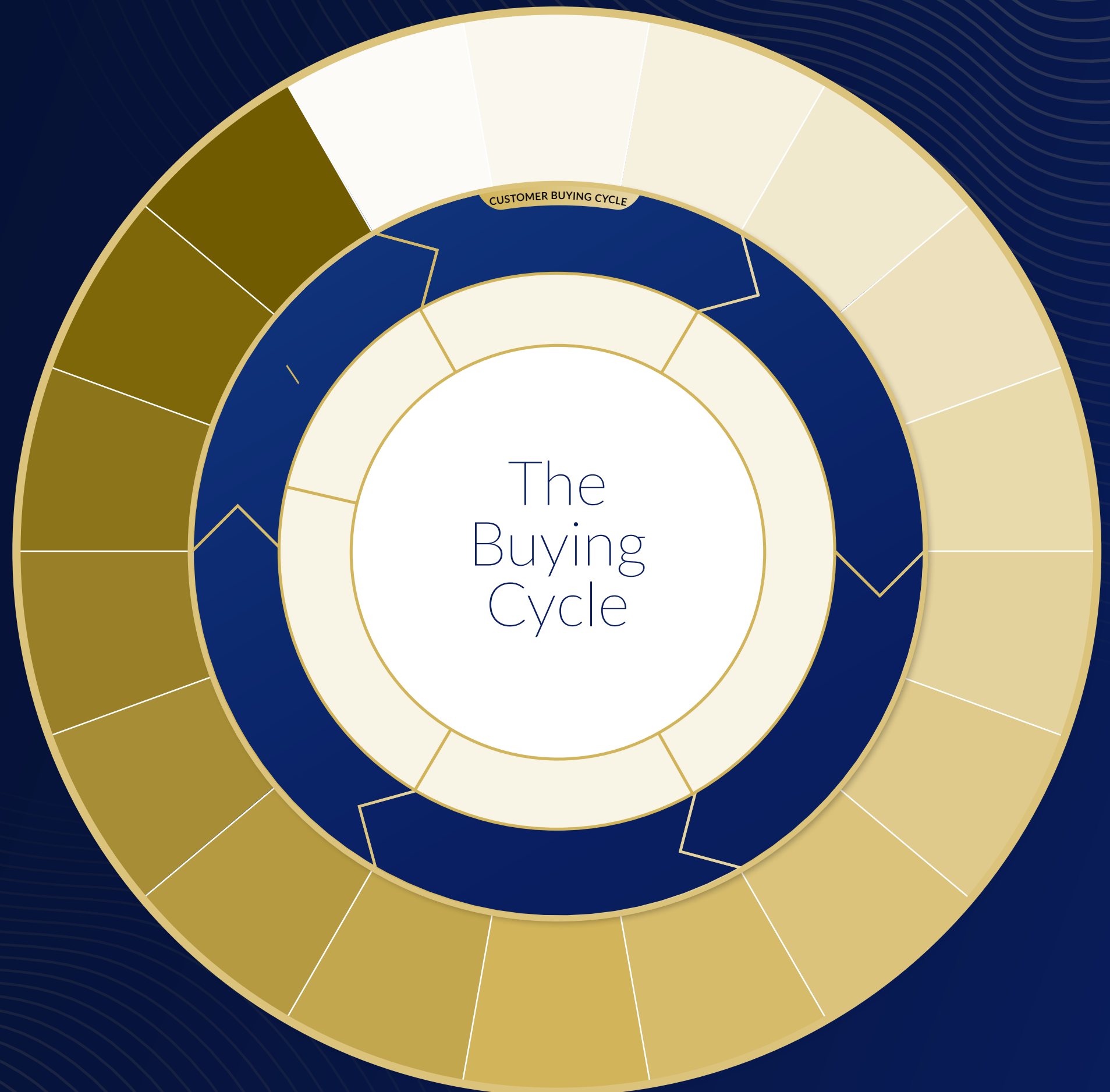
To use the tool, click below to begin troubleshooting by either Issues or Skills. Then explore the interactive tiles in the graphic and receive Imparta’s guidance on the key skills required, the right questions to ask and management actions to take to address the skill gap.

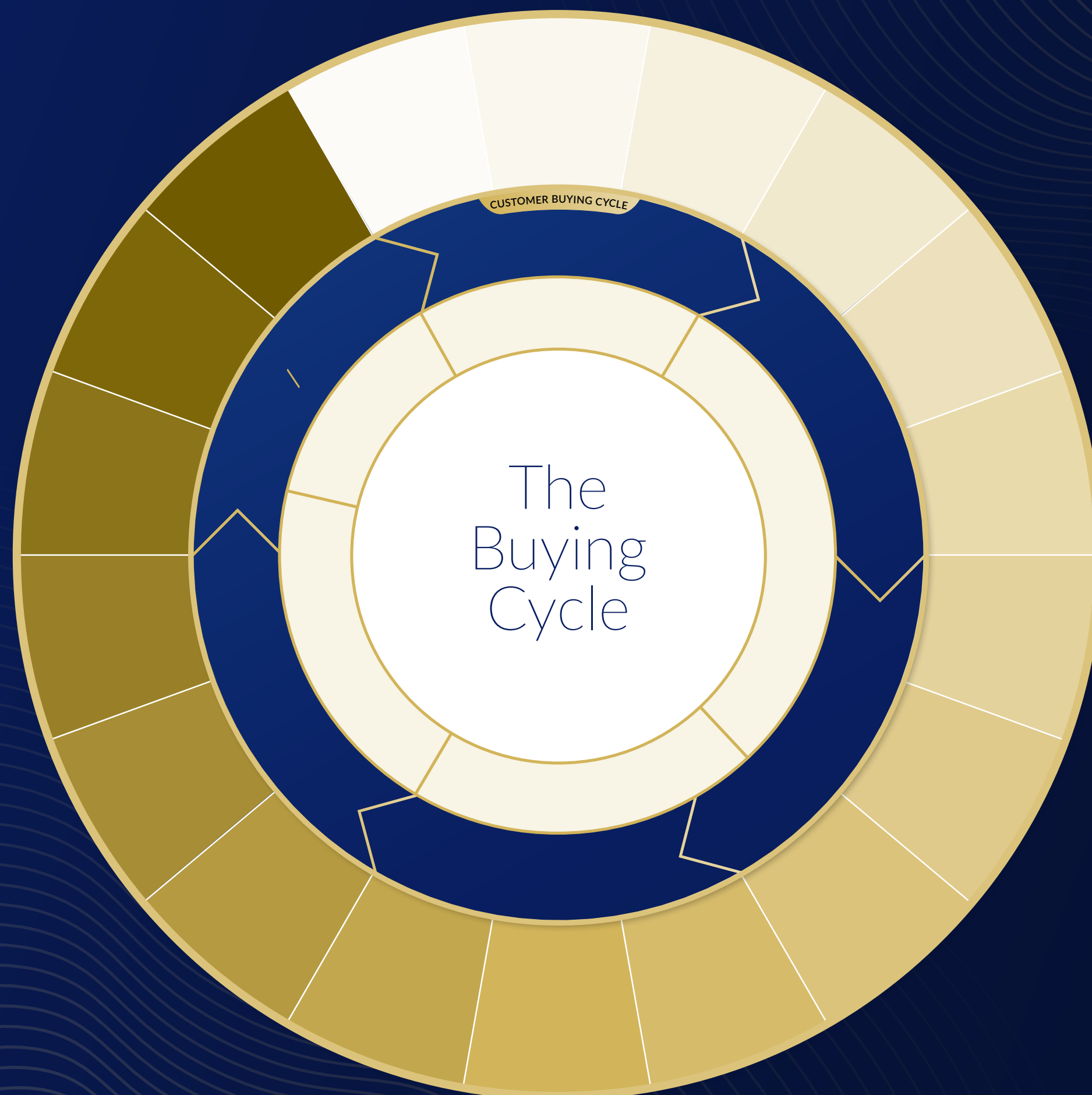
By selecting the icon in the Course column, you will be redirected to our website where you will learn more about how Imparta can rapidly upskill your sales team in the areas you have identified.

KEY SKILLS



Click relevant **segments** for additional insight to chosen subject.
To return click cycle icon, top right of each linked page.





TYPICAL ISSUES



Click relevant **segments** for additional insight to chosen subject.
To return click cycle icon, top right of each linked page.

Lead Generation

SKILL AREA	TYPICAL ISSUES	KEY SKILLS	TOOLS	KEY QUESTIONS TO ASK	OTHER MANAGEMENT ACTIONS	COURSE
Identifying Opportunities	Too few proactive opportunities identified	Develop a hypothesis about important customer objectives (KPIs, challenges and wider goals). Consider future objectives using the PESTEL framework. Map capabilities onto those objectives to identify potential opportunities. Focus on those that are most urgent and important.	Value Chain (Opportunity Canvas)	<ul style="list-style-type: none"> Which objectives are customers struggling to meet right now? How will those objectives change? Have you looked beyond your comfort zone functions? Which of our solutions map onto those objectives? 	<p>Test the quality of the Value Chain and insights. Put them in touch with colleagues who understand the sector.</p> <p>Work with Marketing to identify the value proposition for each industry sector.</p> <p>Help to plan account entry and to make connections where possible.</p>	Click the course icon below to visit the web page
Targeting	No clear definition of target organisation, role, timing or message.	Based on the analysis of the urgent needs we can meet, define targets using Who (functions and roles); Where (company sector or size); What (objectives and capabilities); When (individual and company triggers) and Why (your goal).	Account Entry Canvas (Enterprise deals) Prospecting Canvas (other)	<ul style="list-style-type: none"> Who do you need to engage with? (Functions and roles) Where are they? (Target market sectors and company size) What can you engage them about? When are they going to be most receptive? 	<p>Help to bring insight to the most productive targets, based on your experience, the business strategy, and your sales strategy.</p> <p>Make sure the team member has clearly defined targets before they invest time in inbound or outbound lead generation.</p>	
Inbound	Not enough incoming leads	Identify where your targets spend time online and offline, and build a professional presence. Respond to blogs and discussions, create new content and share content from your own company and third parties.	Prospecting Canvas	<ul style="list-style-type: none"> Where do your target prospects spend time? What's your profile there like? Do you plan to respond to questions, blogs, etc.? What content can you create or reshare to build your presence? 	<p>Emphasise the power of inbound leads created by sales activity as well as marketing.</p> <p>Follow your team online, and like and re-share their posts.</p> <p>Suggest company or even third-party content that they could re-share.</p>	
Outbound	Struggle to engage stakeholders. Generic, vs. tailored, prospecting.	<p>Assess the number of engagement attempts you need to hit quota.</p> <p>Find, connect with and engage with potential Centres of Receptivity.</p> <p>Use the 3D Advantage (Insight, Influence and Trust) to create tailored and effective communications.</p> <p>Sell the value in a longer meeting.</p>	Account Entry Canvas (Enterprise deals) Prospecting Canvas (other)	<ul style="list-style-type: none"> How many new deals do you need to hit quota? Given your win rate, how many opportunities is that? What activity level will that require? How are you doing at the moment? How are you tailoring your approach to each customer, to 'cut through the noise'? Could any customers give you a referral? 	<p>Define target activity levels with the team, then follow-up and track.</p> <p>Work with the team on a few example connection attempts to show the value of a truly tailored approach.</p> <p>Provide material they can use in engaging with their new connections.</p>	

Opportunity Management: Need

SKILL AREA	TYPICAL ISSUES	KEY SKILLS	TOOLS	KEY QUESTIONS TO ASK	OTHER MANAGEMENT ACTIONS	COURSE
Establishing an explicit need	Struggle to engage stakeholders or establish explicit need.	<p>Validate potential opportunities with a Centre of Receptivity (CoR).</p> <p>Identify the Centre of Need (CoN) and meet (with the CoR if appropriate) to confirm their unmet objectives.</p> <p>Ask insightful questions about the barriers to achieving these objectives. Draw on insights from self, others and the customer to uncover the root causes of these barriers.</p> <p>Map your capabilities to the root causes to resolve them.</p>	Need Canvas	<ul style="list-style-type: none"> What customer objectives could you help to achieve? Who owns those objectives? What insights can you offer about their objectives, the barriers to achieving them, or the possible solutions? What are the best questions to ask? Are any other stakeholders affected by the same issue? 	<p>Identify your role in helping the salesperson get meetings at higher levels; determine how your involvement will increase the number and level of contacts in the account.</p> <p>Ensure the salesperson is clear about the goals of this meeting; help them to plan and work collaboratively with internal resources, and to leverage previous successes.</p>	Click the course icon below to visit the web page
Building urgency and momentum	Deal stalled - not enough urgency.	<p>Focus on the objectives that customers are struggling to achieve.</p> <p>Uncover pain at the strategic, tactical, political and individual levels. Contrast with the Gain from your solution (contrast bias). Ask, don't just tell.</p> <p>Use stakeholder analysis to coach client contacts to unblock decision-making and build consensus.</p>	Need Canvas	<ul style="list-style-type: none"> How big is the pain if the customer's objectives are not achieved? How big is the gain if they are achieved? Are there any other roadblocks to achieving consensus? 	<p>Conduct analyses of accounts that have been won and discuss why other customers have decided to buy your solutions</p> <p>Share stories about what they have done for the customer or what was avoided; formalise ways of creating PAIN (e.g., customer requirements analyses) and showing potential GAIN.</p>	
Proving value	Deal stalled - no consensus on taking action.	<p>Quantify the benefits (Strategic, Tactical, Political and Individual), less the costs of buying and using your solution. Work with key contacts to create realistic estimates.</p> <p>Differentiate value in year 1 vs. subsequent.</p> <p>Avoid Single Option Aversion. Consider using decoys to encourage a decision.</p>	Need Canvas	<ul style="list-style-type: none"> Have you quantified the benefits? Have you estimated the costs of buying and using our solution? How much value can be created in the first and subsequent years? 	<p>Help salespeople to create reasonable estimates of impact.</p> <p>Ensure they build and maintain trust by not over-estimating benefits, and by acting as an impartial business equal to their key customer contacts.</p>	

Opportunity Management: Choose

SKILL AREA	TYPICAL ISSUES	KEY SKILLS	TOOLS	KEY QUESTIONS TO ASK	OTHER MANAGEMENT ACTIONS	COURSE
Qualifying & Reframing	Not sure whether to bid.	<p>Assess opportunity attractiveness (deal size and duration, customer attitudes, etc.) and achievability (explicit need, pain, lack of incumbent, access to stakeholders, fit with our proposition, etc.)</p> <p>Pursue achievable and attractive deals, cherry pick a few less attractive ones, and place a few bets on attractive but harder-to-win opportunities. Before rejecting an opportunity, try reframing the need into one that fits better.</p>	Pitch Canvas	<ul style="list-style-type: none"> How attractive is this deal? How achievable is this deal for us? Versus the competition? Versus doing nothing? How do you plan to allocate your time between different opportunities (and other activities such as prospecting)? 	<p>Make sure the team has an objective assessment of attractiveness and achievability – be the ‘conscience’ of this.</p> <p>Help them to make sensible decisions about their time allocation, and when to ‘place a bet’.</p> <p>Help to gain access to senior customer stakeholders to reframe their need if necessary.</p>	<p>Click the course icon below to visit the web page</p>
Creating a Pitch Strategy	Competitive risk or need to displace incumbent supplier.	<p>Uncover decision criteria with the client, clarify and prioritize them, and find out how they perceive your solution relative to the alternatives they are considering. Develop a strategy to deal with:</p> <ul style="list-style-type: none"> Value Winners (important; strong) Value Killers (important; weak) Value Sleepers (unimportant; strong). 	Pitch Canvas	<ul style="list-style-type: none"> What criteria is the customer using to choose suppliers? What are our Value Winners, Killers and Sleepers? How can you protect the Winners, e.g. with hard data? How can you neutralize the Killers, e.g. by improving our capabilities? How can you wake up the Sleepers, e.g. using pain questions to show importance. 	<p>Test the salesperson's Value Map. Challenge their thinking around Value Winners, Killers and Sleepers.</p> <p>Pay particular attention to Value Killers. If aligned with strategy, use internal resources or build alliances to create or strengthen capabilities where needed, or to provide senior reassurance to the customer.</p>	
The Perfect Pitch	Need to deliver a perfect pitch (especially in a virtual setting).	<p>Design a pitch that has positive peaks and a highly positive ending, using the Perfect Pitch model. For example, bring insight to the customer’s need, create a contrasting vision of the future, implement the strategy around decision criteria (Winners, Killers and Sleepers), frame price around value, and avoid single options.</p>	Pitch Canvas	<ul style="list-style-type: none"> Are you using the Perfect Pitch structure? What positive peaks can you build in to the pitch? How can you create a powerful ending? Are you planning to implement your pitch strategy in the pitch itself? 	<p>Test and refine the pitch strategy with the team. Act as the customer in the final run-through. Provide genuine and balanced feedback.</p> <p>Help them to reframe the decision if necessary to focus on your strengths.</p>	

Opportunity Management: Worry

SKILL AREA	TYPICAL ISSUES	KEY SKILLS	TOOLS	KEY QUESTIONS TO ASK	OTHER MANAGEMENT ACTIONS	COURSE
Managing Stakeholders	Some stakeholders prefer a different solution	<p>Work with the account team and receptive customer contacts to understand where individual stakeholders lie, and what is driving their alignment.</p> <p>Map stakeholders, on the basis of their level of influence and alignment to your solution.</p> <p>Leverage Insight, Influence and Trust to engage supportive stakeholders and:</p> <ul style="list-style-type: none"> Protect and Leverage Champions Raise the influence of Supporters Contain Opponents Convert or Circumvent Nemeses 	Risk Canvas	<ul style="list-style-type: none"> Have you identified all the stakeholders who will have a say in this decision? Which are the most influential? How are they aligned? Have you created a stakeholder strategy? 	<p>Provide a sanity check on stakeholder strategies.</p> <p>Support the salesperson as needed in establishing and leveraging more senior contacts.</p>	<p>Click the course icon below to visit the web page</p>
Identifying and Alleviating Risks	Things went quiet after the pitch.	<p>Anticipate and recognise the signs of risk (especially new stakeholders being introduced).</p> <p>Identify potential risks (without creating new ones for the customer) at four levels: Strategic, Tactical, Political, and Individual.</p> <p>Take steps to:</p> <ul style="list-style-type: none"> Correct any misperceptions; Reduce the likelihood of something going wrong (prevention); Reduce the impact if it does (cure). 	Risk Canvas	<ul style="list-style-type: none"> Why do you think things have gone quiet? Have you uncovered any potential risks perceived by the customer? Are there any misperceptions about risk? Can you reduce any risks (prevention)? Can you reduce the impact if the risk materialises (cure)? 	<p>Remind salespeople that when things go quiet, the customer may be talking to a competitor, but may also be dealing with risk.</p> <p>Share issues that typically come up during the late stages of the sales cycle, and the techniques that typically help customers address/manage them.</p> <p>Play a personal role where senior involvement can help to alleviate risk.</p>	

Margin Management: Commit

SKILL AREA	TYPICAL ISSUES	KEY SKILLS	TOOLS	KEY QUESTIONS TO ASK	OTHER MANAGEMENT ACTIONS	COURSE
Profiling Counterparts Managing BATNA	We've been told we're too expensive.	Identify and assess likely negotiation counterparts, leveraging your contacts. Identify the customer's Best Alternative to a Negotiated Agreement (BATNA), using the Kraljic matrix. Identify and strengthen your own BATNA, e.g. using scarce resources on other clients, or making a cut-down offer.	Negotiation Planning Canvas	<ul style="list-style-type: none"> What's your BATNA? Can you improve it? What is the customer's BATNA? Can you quantify how much more value you offer than the next best option? How could you make us seem more differentiated? 	Use your experience of other deals to help profile counterparts and to assess customer walkaways and interests. Help the team to understand that Procurement are trained to create uncertainty and stress, and to stay focused on the customer's needs without becoming confrontational or angry.	Click the course icon below to visit the web page
Anchoring & Framing Uncovering Interests	No clear negotiation strategy.	Anchor (during the pitch) and re-anchor (after the pitch) at just above the customer's likely walkaway point, avoiding the chill effect. Recognise customer anchors and use the appropriate strategy to lift them. Identify full range of customer interests, based on their needs, criteria and risks.	Negotiation Planning Canvas	<ul style="list-style-type: none"> Where should we anchor (close to their walkaway point)? What are their negotiation interests? (consider underlying needs, decision criteria and risk alleviation factors) 	Challenge the team to gather as much insight as they can. Challenge the re-anchor point to balance risk and reward.	
Trading Gives & Gets Managing Stakeholders	Deal at risk, or making too many concessions.	Create a Give/Get matrix showing which interests can be traded off to create value for both parties. When conceding a 'Give', always try to achieve a 'Get' in return. When asked for a concession, use FAST (Frame, Advance options, Signal BATNA, Track Gives & Gets) to minimize value leakage.	Negotiation Interests Canvas Negotiation Trading Canvas	<ul style="list-style-type: none"> What do they care about more than us? What do we care about more than them? Could we create value by offering conditional tradeoffs? 	Encourage proactive planning using the Give/Get matrix. Role-play customer concession requests with the team. Provide support and a source of resilience during the difficult and uncertain aspects of a negotiation.	
Defending Value	Price & terms under attack from Procurement	Recognise Procurement tactics for what they are. Deploy specific response strategies, depending on the approach in use, from Best of Best pricing to future gains, no authority, nibbling and reopening. Leverage receptive stakeholders to gain insight into the customer's true negotiation interests and to influence the process	Negotiation Tactical Canvas	<ul style="list-style-type: none"> Is the pressure you're feeling deliberate? What tactics are Procurement using? How can you remain resilient? Can you label the tactic to help defuse it? What do you know? And how can you find out more? 	Provide support and a source of resilience during the difficult and uncertain aspects of a negotiation. Coach around specific challenges and responses, driving a rigorous approach and avoiding panic. Assist with gaining access to, and insight from, senior customer stakeholders.	

Customer Success: Adopt

SKILL AREA	TYPICAL ISSUES	KEY SKILLS	TOOLS	KEY QUESTIONS TO ASK	OTHER MANAGEMENT ACTIONS	COURSE
Onboarding Implementation and launch	Implementation slow or not going well.	<p>Onboard yourself and the customer. Provide insights into process, risks and KPIs. Define success metrics. Co-develop implementation plans to ensure buy-in and ownership, and manage expectations.</p> <p>Reduce Time to First Value by influencing best practices, creating an effective team culture and cadence, and mobilizing resources as needed. Treat users as customers with their own decision cycle.</p>	Onboarding & Launch Canvas	<ul style="list-style-type: none"> What are the underlying needs that we're meeting? What key decision criteria do we need to excel on? What risks do we need to avoid? What 'Wow moments' are we aiming for? Does the launch follow best practice? What is your meeting cadence? Do you need help mobilizing resources? 	<p>Challenge the CS professional to onboard themselves in the customer first.</p> <p>Share onboarding and implementation plans that have worked effectively for similar engagements. Help the CSM to identify and secure any necessary internal and/or third-party resources.</p> <p>Debrief successful implementations to identify the key stakeholders involved and how they were engaged.</p>	<p>Click the course icon below to visit the web page</p>
Driving adoption Solving problems	Adoption is low	<p>Bring insights into adoption issues & likely strategies to address them. Uncover the root causes of adoption barriers, and use creative problem-solving where necessary (IDEAL).</p> <p>Influence customer stakeholders on change and people issues, not just tactical and technical ones. Manage user Skill/Will/Way.</p> <p>Build trust with accountability and clarity.</p>	Adoption Canvas	<ul style="list-style-type: none"> How is adoption going? What's is the data telling you? What adoption barriers have you managed to identify? Are they issues of Skill, Will, or Way? Depending on the answer, can you help with training, communication or addressing specific Way issues? 	<p>Run root cause analysis sessions for/with the team if necessary.</p> <p>Coach around possible solutions to adoption barriers.</p> <p>Help to mobilise any internal resources or support need to improve adoption, recognising the impact on renewal rates and account expansion.</p>	
Managing customer health Handling difficult conversations	Low value, or value not being recognized.	<p>Track customer results (adoption, impact, ROI) and experience (e.g. effort, CSAT and NPS). Understand which are most important and manage the Health Map by taking action, but also by comparing to trends and benchmarks for the industry.</p> <p>Hold QBR/ABRs that reflect the Peak/End Rule, and handle any difficult conversations in a way that displays empathy, reduces tension, and delivers customer justice.</p>	Customer Health Canvas	<ul style="list-style-type: none"> What's is the data telling you about customer health? What results are they achieving? How is their experience (e.g., Effort, CSAT, NPS)? How can you address health issues? How are you structuring your MBR/ QBR/ABRs? 	<p>Remove any organisational barriers to adequately servicing this customer.</p> <p>Coach the team to manage both the perceived perception of health metrics, and their relative importance, on a regular, proactive basis.</p> <p>Help them to 'look down the runway' at renewal, even if several years away.</p>	

Customer Success: Renew

SKILL AREA	TYPICAL ISSUES	KEY SKILLS	TOOLS	KEY QUESTIONS TO ASK	OTHER MANAGEMENT ACTIONS	COURSE
Building advocacy	Unable to leverage existing relationships for renewal and/or account expansion	<p>Identify current and future Promoters (good experience and results), Detractors (poor on both), Passives (good results but poor experience) and Time Bombs (good experience but poor results)</p> <p>Extend customer focus to the individual. Understand the role of emotional activators in turning Promoters into Evangelists, and create a concrete plan to create trust, good surprises, joy and positive anticipation.</p> <p>Leverage Promoters and Evangelists by asking for internal support (e.g., with renewal), and external referrals.</p>	Renewal Canvas	<ul style="list-style-type: none"> What is our NPS? Are you able to identify which stakeholders are Promoters, Detractors, Passives, or Time Bombs? Are you doing anything to create positive emotions for your Promoters, to turn them into Evangelists? Have you asked for any referrals? 	<p>Help the account team to understand where individual stakeholders lie, and what is driving their alignment.</p> <p>Provide a sanity check on stakeholder strategies.</p> <p>Support the salesperson as needed in establishing and leveraging more senior contacts.</p> <p>Coach to overcome the resistance to asking for referrals.</p>	<p>Click the course icon below to visit the web page</p>
Securing renewal	Renewal at risk	<p>Demonstrate the value that has been delivered, using health data.</p> <p>Bring insight to new needs, created by changes to the customer, its own customers and competitors, or external forces.</p> <p>Reaffirm decision criteria with the client, prioritize them, and find out how they now perceive your solution vs. the alternatives.</p> <p>Identify and alleviate any ongoing risks.</p> <p>Achieve commitment by triggering loss aversion, and if necessary, offering low-cost 'Gives' in the renewal negotiation.</p>	Renewal Canvas	<ul style="list-style-type: none"> Have you quantified the value created? How have their needs changed? Have their decision criteria changed? Are they perceiving any new risks? Are they just negotiating? And if so, what's your concession strategy? 	<p>Encourage proactivity as renewal approaches.</p> <p>Help to quantify value, and ask questions to uncover insights into changed needs.</p> <p>Test the current Value Map and challenge their thinking around Value Winners, Killers and Sleepers. Use internal resources or build alliances to create or strengthen capabilities where needed, or to provide senior reassurance to the customer.</p> <p>Help to rehearse the renewal pitch, if appropriate, using the Peak/End Rule.</p>	

Account Management: Expand

SKILL AREA	TYPICAL ISSUES	KEY SKILLS	TOOLS	KEY QUESTIONS TO ASK	OTHER MANAGEMENT ACTIONS	COURSE
Creating an Account Strategy	Struggling to expand the account; stuck in comfort zone	<p>Complete an Account Gameboard, looking at share of wallet across all business units and territories.</p> <p>Create a robust strategy around where to compete in the account, and how to create strategic advantage.</p>	Account Canvas	<ul style="list-style-type: none"> What Autonomous Buying Units exist in this account? Which of our product and service categories are relevant? What's our share of wallet for each category, in each ABU? Where are the opportunities? The risks? What's your strategy for each ABU? 	<p>Run account planning sessions, focusing on idea generation rather than reporting. Run the Plan-Do-Review cycle on a regular basis</p> <p>Share strategies used to leverage success in one area to open up opportunities in other areas. Ensure salespeople are rewarded for expansion across existing accounts.</p>	<p>Click the course icon below to visit the web page</p>
Managing account profitability	Unprofitable accounts with too much activity for the revenue, too many discounts or unbilled activity.	Estimate net profit on an account, even with imperfect information. Identify profit leakages, from discounts or a less profitable product mix, to excess sales activity, value adds, and unbilled support. Find ways to minimize these profit leakages.	Account Canvas	<ul style="list-style-type: none"> Have you been able to assess net profit for this account? What are the main profit leakages? How could we reduce them, or ask the customer to pay more? 	<p>Help the team to gain access to account-level financial information where possible, and to make sensible estimates where not.</p> <p>Run creative problem solving sessions to identify ways to reduce profit leakage.</p>	
Managing Stakeholders	Stakeholders are blocking expansion of the account.	<p>Work with the account team and receptive contacts to understand where individual stakeholders lie, and what is driving their alignment. Map stakeholders, based on their level of influence and alignment to you.</p> <p>Leverage Insight, Influence and Trust to engage supportive stakeholders, neutralise Nemeses and Opponents, and strengthen Champions and Supporters.</p>	Account Canvas	<ul style="list-style-type: none"> Who are the main stakeholders relevant to our activity? What's their relative level of influence and perception of us? How can you: <ul style="list-style-type: none"> Protect/leverage Champions? Raise the influence of Supporters? Contain Opponents? Convert or Circumvent Nemeses? 	<p>Provide a sanity check on stakeholder strategies.</p> <p>Support the salesperson as needed in establishing and leveraging more senior contacts.</p>	
Identifying & Prioritising Opportunities	Too few proactive opportunities identified, or not making progress on any.	<p>Develop a hypothesis about important customer objectives (KPIs, challenges and wider goals). Consider future objectives using the PESTEL framework.</p> <p>Map capabilities onto objectives to identify and prioritise potential opportunities.</p>	Opportunity Canvas	<ul style="list-style-type: none"> What are the main objectives of the key functions? Which objectives are hard to achieve? Who can you discuss that with? Which objectives could we help with? Who should you speak to next? 	<p>Test the quality of the Value Chain and insights.</p> <p>Put them in touch with colleagues who understand the sector.</p> <p>Help to plan ways to access new areas of decision-making, and to make connections where possible.</p>	

Opportunity Management: Need

TYPICAL ISSUES

Struggle to engage stakeholders or establish explicit need

KEY SKILLS	TOOLS	KEY QUESTIONS TO ASK	OTHER MANAGEMENT ACTIONS	COURSE
<p>Validate potential opportunities with a Centre of Receptivity (CoR).</p> <p>Identify the Centre of Need (CoN) and meet (with the CoR if appropriate) to confirm their unmet objectives.</p> <p>Ask insightful questions about the barriers to achieving these objectives. Draw on insights from self, others and the customer to uncover the root causes of these barriers.</p> <p>Map your capabilities to the root causes to resolve them</p>	<p>Need Canvas</p>	<ul style="list-style-type: none"> What customer objectives could you help to achieve? Who owns those objectives? What insights can you offer about their objectives, the barriers to achieving them, or the possible solutions? What are the best questions to ask? Are any other stakeholders affected by the same issue? 	<p>Identify your role in helping the salesperson get meetings at higher levels; determine how your involvement will increase the number and level of contacts in the account.</p> <p>Ensure the salesperson is clear about the goals of this meeting; help them to plan and work collaboratively with internal resources, and to leverage previous successes.</p>	<p>Click the course icon below to visit the web page</p>

Opportunity Management: Need

TYPICAL ISSUES

Deal stalled - not enough urgency

KEY SKILLS	TOOLS	KEY QUESTIONS TO ASK	OTHER MANAGEMENT ACTIONS	COURSE
<p>Focus on the objectives that customers are struggling to achieve.</p> <p>Uncover pain at the strategic, tactical, political and individual levels. Contrast with the Gain from your solution (contrast bias). Ask, don't just tell.</p> <p>Use stakeholder analysis to coach client contacts to unblock decision-making and build consensus.</p>	Need Canvas	<ul style="list-style-type: none"> How big is the pain if the customer's objectives are not achieved? How big is the gain if they are achieved? Are there any other roadblocks to achieving consensus? 	<p>Conduct analyses of accounts that have been won and discuss why other customers have decided to buy your solutions</p> <p>Share stories about what they have done for the customer or what was avoided; formalize ways of creating PAIN (e.g., customer requirements analyses) and showing potential GAIN.</p>	<p>Click the course icon below to visit the web page</p>

Opportunity Management: Need

TYPICAL ISSUES

Deal stalled - no consensus on taking action

KEY SKILLS	TOOLS	KEY QUESTIONS TO ASK	OTHER MANAGEMENT ACTIONS	COURSE
<p>Quantify the benefits (Strategic, Tactical, Political and Individual), less the costs of buying and using your solution. Work with key contacts to create realistic estimates.</p> <p>Differentiate value in year 1 vs. subsequent.</p> <p>Avoid Single Option Aversion. Consider using decoys to encourage a decision.</p>	<p>Need Canvas</p>	<ul style="list-style-type: none">• Have you quantified the benefits?• Have you estimated the costs of buying and using our solution?• How much value can be created in the first and subsequent years?	<p>Help salespeople to create reasonable estimates of impact.</p> <p>Ensure they build and maintain trust by not over-estimating benefits, and by acting as an impartial business equal to their key customer contacts.</p>	<p>Click the course icon below to visit the web page</p>

Opportunity Management: Choose

TYPICAL ISSUES

Not sure whether to bid

KEY SKILLS	TOOLS	KEY QUESTIONS TO ASK	OTHER MANAGEMENT ACTIONS	COURSE
<p>Assess opportunity attractiveness (deal size and duration, customer attitudes, etc.) and achievability (explicit need, pain, lack of incumbent, access to stakeholders, fit with our proposition, etc.)</p> <p>Pursue achievable and attractive deals, cherry pick a few less attractive ones, and place a few bets on attractive but harder-to-win opportunities. Before rejecting an opportunity, try reframing the need into one that fits better.</p>	Pitch Canvas	<ul style="list-style-type: none"> How attractive is this deal? How achievable is this deal for us? Versus the competition? Versus doing nothing? How do you plan to allocate your time between different opportunities (and other activities such as prospecting)? 	<p>Make sure the team has an objective assessment of attractiveness and achievability – be the ‘conscience’ of this.</p> <p>Help them to make sensible decisions about their time allocation, and when to ‘place a bet’.</p> <p>Help to gain access to senior customer stakeholders to reframe their need if necessary.</p>	<p>Click the course icon below to visit the web page</p>

Opportunity Management: Choose

TYPICAL ISSUES

Competitive risk or need to displace incumbent supplier

KEY SKILLS	TOOLS	KEY QUESTIONS TO ASK	OTHER MANAGEMENT ACTIONS	COURSE
<p>Uncover decision criteria with the client, clarify and prioritize them, and find out how they perceive your solution relative to the alternatives they are considering. Develop a strategy to deal with:</p> <ul style="list-style-type: none">• Value Winners (important; strong)• Value Killers (important; weak)• Value Sleepers (unimportant; strong).	<p>Pitch Canvas</p>	<ul style="list-style-type: none">• What criteria is the customer using to choose suppliers? What are our Value Winners, Killers and Sleepers?• How can you protect the Winners, e.g. with hard data?• How can you neutralize the Killers, e.g. by improving our capabilities?• How can you wake up the Sleepers, e.g. using pain questions to show importance.	<p>Test the salesperson's Value Map. Challenge their thinking around Value Winners, Killers and Sleepers.</p> <p>Pay particular attention to Value Killers. If aligned with strategy, use internal resources or build alliances to create or strengthen capabilities where needed, or to provide senior reassurance to the customer.</p>	<p>Click the course icon below to visit the web page</p>

Opportunity Management: Choose

TYPICAL ISSUES

Need to deliver a perfect pitch (especially in a virtual setting)

KEY SKILLS	TOOLS	KEY QUESTIONS TO ASK	OTHER MANAGEMENT ACTIONS	COURSE
Design a pitch that has positive peaks and a highly positive ending, using the Perfect Pitch model. For example, bring insight to the customer's need, create a contrasting vision of the future, implement the strategy around decision criteria (Winners, Killers and Sleepers), frame price around value, and avoid single options.	Pitch Canvas	<ul style="list-style-type: none"> Are you using the Perfect Pitch structure? What positive peaks can you build in to the pitch? How can you create a powerful ending? Are you planning to implement your pitch strategy in the pitch itself? 	<p>Test and refine the pitch strategy with the team.</p> <p>Act as the customer in the final run-through. Provide genuine and balanced feedback.</p> <p>Help them to reframe the decision if necessary to focus on your strengths.</p>	Click the course icon below to visit the web page

Opportunity Management: Worry

TYPICAL ISSUES

Some stakeholders prefer a different solution

KEY SKILLS	TOOLS	KEY QUESTIONS TO ASK	OTHER MANAGEMENT ACTIONS	COURSE
<p>Work with the account team and receptive customer contacts to understand where individual stakeholders lie, and what is driving their alignment.</p> <p>Map stakeholders, on the basis of their level of influence and alignment to your solution.</p> <p>Leverage Insight, Influence and Trust to engage supportive stakeholders and:</p> <ul style="list-style-type: none"> • Protect and Leverage Champions • Raise the influence of Supporters • Contain Opponents • Convert or Circumvent Nemeses 	<p>Risk Canvas</p>	<ul style="list-style-type: none"> • Have you identified all the stakeholders who will have a say in this decision? • Which are the most influential? • How are they aligned? • Have you created a stakeholder strategy? 	<p>Provide a sanity check on stakeholder strategies.</p> <p>Support the salesperson as needed in establishing and leveraging more senior contacts.</p>	<p>Click the course icon below to visit the web page</p>

Opportunity Management: Worry

TYPICAL ISSUES

Things went quiet after the pitch

KEY SKILLS	TOOLS	KEY QUESTIONS TO ASK	OTHER MANAGEMENT ACTIONS	COURSE
<p>Anticipate and recognise the signs of risk (especially new stakeholders being introduced).</p> <p>Identify potential risks (without creating new ones for the customer) at four levels: Strategic, Tactical, Political, and Individual.</p> <p>Take steps to:</p> <ul style="list-style-type: none"> Correct any misperceptions; Reduce the likelihood of something going wrong (prevention); Reduce the impact if it does (cure). 	<p>Risk Canvas</p>	<ul style="list-style-type: none"> Why do you think things have gone quiet? Have you uncovered any potential risks perceived by the customer? Are there any misperceptions about risk? Can you reduce any risks (prevention)? Can you reduce the impact if the risk materialises (cure)? 	<p>Remind salespeople that when things go quiet, the customer may be talking to a competitor, but may also be dealing with risk.</p> <p>Share issues that typically come up during the late stages of the sales cycle, and the techniques that typically help customers address/manage them.</p> <p>Play a personal role where senior involvement can help to alleviate risk.</p>	<p>Click the course icon below to visit the web page</p>

Margin Management: Commit

TYPICAL ISSUES

We've been told we're too expensive

KEY SKILLS	TOOLS	KEY QUESTIONS TO ASK	OTHER MANAGEMENT ACTIONS	COURSE
<p>Identify and assess likely negotiation counterparts, leveraging your contacts.</p> <p>Identify the customer's Best Alternative to a Negotiated Agreement (BATNA), using the Kraljic matrix. Identify and strengthen your own BATNA, e.g. using scare resources on other clients, or making a cut-down offer.</p>	<p>Negotiation Planning Canvas</p>	<ul style="list-style-type: none">• What's your BATNA? Can you improve it?• What is the customer's BATNA? Can you quantify how much more value we offer than the next best option?• How could you make us seem more differentiated?	<p>Use your experience of other deals to help profile counterparts and to assess customer walkaways and interests. Help the team to understand that Procurement are trained to create uncertainty and stress, and to stay focused on the customer's needs without becoming confrontational or angry.</p>	<p>Click the course icon below to visit the web page</p>

Margin Management: Commit

TYPICAL ISSUES

No clear negotiation strategy

KEY SKILLS	TOOLS	KEY QUESTIONS TO ASK	OTHER MANAGEMENT ACTIONS	COURSE
<p>Anchor (during the pitch) and re-anchor (after the pitch) at just above the customer's likely walkaway point, avoiding the chill effect. Recognise customer anchors and use the appropriate strategy to lift them.</p> <p>Identify full range of customer interests, based on their needs, criteria and risks.</p>	<p>Negotiation Planning Canvas</p>	<ul style="list-style-type: none">• Where should we anchor (close to their walkaway point)?• What are their negotiation interests? (consider underlying needs, decision criteria and risk alleviation factors)	<p>Challenge the team to gather as much insight as they can.</p> <p>Challenge the re-anchor point to balance risk and reward.</p>	<p>Click the course icon below to visit the web page</p>

Margin Management: Commit

TYPICAL ISSUES

Deal at risk, or making too many concessions

KEY SKILLS	TOOLS	KEY QUESTIONS TO ASK	OTHER MANAGEMENT ACTIONS	COURSE
Create a Give/Get matrix showing which interests can be traded off to create value for both parties. When conceding a 'Give', always try to achieve a 'Get' in return. When asked for a concession, use FAST (Frame, Advance options, Signal BATNA, Track Gives & Gets) to minimize value leakage.	Negotiation Planning Canvas Negotiation Trading Canvas	<ul style="list-style-type: none">What do they care about more than us?What do we care about more than them?Could we create value by offering conditional tradeoffs?	Encourage proactive planning using the Give/Get matrix. Role-play customer concession requests with the team. Provide support and a source of resilience during the difficult and uncertain aspects of a negotiation.	Click the course icon below to visit the web page

Margin Management: Commit

TYPICAL ISSUES

Price & terms under attack from Procurement

KEY SKILLS	TOOLS	KEY QUESTIONS TO ASK	OTHER MANAGEMENT ACTIONS	COURSE
<p>Recognise Procurement tactics for what they are. Deploy specific response strategies, depending on the approach in use, from Best of Best pricing to future gains, no authority, nibbling and reopening.</p> <p>Leverage receptive stakeholders to gain insight into the customer's true negotiation interests and to influence the process</p>	<p>Negotiation Tactical Canvas</p>	<ul style="list-style-type: none">• Is the pressure you're feeling deliberate?• What tactics are Procurement using?• How can you remain resilient?• Can you label the tactic to help defuse it?• What do you know? And how can you find out more?	<p>Provide support and a source of resilience during the difficult and uncertain aspects of a negotiation.</p> <p>Coach around specific challenges and responses, driving a rigorous approach and avoiding panic.</p> <p>Assist with gaining access to, and insight from, senior customer stakeholders.</p>	<p>Click the course icon below to visit the web page</p>

Customer Success: Adopt

TYPICAL ISSUES

Implementation slow or not going well

KEY SKILLS	TOOLS	KEY QUESTIONS TO ASK	OTHER MANAGEMENT ACTIONS	COURSE
<p>Onboard yourself and the customer. Provide insights into process, risks and KPIs. Define success metrics. Co-develop implementation plans to ensure buy-in and ownership, and manage expectations.</p> <p>Reduce Time to First Value by influencing best practices, creating an effective team culture and cadence, and mobilizing resources as needed. Treat users as customers with their own decision cycle.</p>	<p>Onboarding & Launch Canvas</p>	<ul style="list-style-type: none"> What are the underlying needs that we're meeting? What key decision criteria do we need to excel on? What risks do we need to avoid? What 'Wow moments' are we aiming for? Does the launch follow best practice? What is your meeting cadence? Do you need help mobilizing resources? 	<p>Challenge the CS professional to onboard themselves in the customer first.</p> <p>Share onboarding and implementation plans that have worked effectively for similar engagements. Help the CSM to identify and secure any necessary internal and/or third-party resources.</p> <p>Debrief successful implementations to identify the key stakeholders involved and how they were engaged.</p>	<p>Click the course icon below to visit the web page</p>

Customer Success: Adopt

TYPICAL ISSUES

Adoption is low

KEY SKILLS	TOOLS	KEY QUESTIONS TO ASK	OTHER MANAGEMENT ACTIONS	COURSE
<p>Bring insights into adoption issues & likely strategies to address them. Uncover the root causes of adoption barriers, and use creative problem-solving where necessary (IDEAL).</p> <p>Influence customer stakeholders on change and people issues, not just tactical and technical ones. Manage user Skill/Will/Way.</p> <p>Build trust with accountability and clarity.</p>	<p>Adoption Canvas</p>	<ul style="list-style-type: none"> How is adoption going? What's is the data telling you? What adoption barriers have you managed to identify? Are they issues of Skill, Will, or Way? Depending on the answer, can you help with training, communication or addressing specific Way issues? 	<p>Run root cause analysis sessions for/with the team if necessary.</p> <p>Coach around possible solutions to adoption barriers.</p> <p>Help to mobilise any internal resources or support need to improve adoption, recognising the impact on renewal rates and account expansion.</p>	<p>Click the course icon below to visit the web page</p>

Customer Success: Adopt

TYPICAL ISSUES

Low value, or value not being recognized

KEY SKILLS	TOOLS	KEY QUESTIONS TO ASK	OTHER MANAGEMENT ACTIONS	COURSE
<p>Track customer results (adoption, impact, ROI) and experience (e.g. effort, CSAT and NPS). Understand which are most important and manage the Health Map by taking action, but also by comparing to trends and benchmarks for the industry.</p> <p>Hold QBR/ABRs that reflect the Peak/End Rule, and handle any difficult conversations in a way that displays empathy, reduces tension, and delivers customer justice.</p>	<p>Customer Health Canvas</p>	<ul style="list-style-type: none"> What's is the data telling you about customer health? What results are they achieving? How is their experience (e.g., Effort, CSAT, NPS)? How can you address health issues? How are you structuring your MBR/ QBR/ABRs? 	<p>Remove any organisational barriers to adequately servicing this customer.</p> <p>Coach the team to manage both the perceived perception of health metrics, and their relative importance, on a regular, proactive basis.</p> <p>Help them to 'look down the runway' at renewal, even if several years away.</p>	<p>Click the course icon below to visit the web page</p>

Customer Success: Renew

TYPICAL ISSUES

Unable to leverage existing relationships for renewal and/or account expansion

KEY SKILLS	TOOLS	KEY QUESTIONS TO ASK	OTHER MANAGEMENT ACTIONS	COURSE
<p>Identify current and future Promoters (good experience and results), Detractors (poor on both), Passives (good results but poor experience) and Time Bombs (good experience but poor results)</p> <p>Extend customer focus to the individual.</p> <p>Understand the role of emotional activators in turning Promoters into Evangelists, and create a concrete plan to create trust, good surprises, joy and positive anticipation.</p> <p>Leverage Promoters and Evangelists by asking for internal support (e.g., with renewal), and external referrals.</p>	Renewal Canvas	<ul style="list-style-type: none">• What is our NPS?• Are you able to identify which stakeholders are Promoters, Detractors, Passives, or Time Bombs?• Are you doing anything to create positive emotions for your Promoters, to turn them into Evangelists?• Have you asked for any referrals?	<p>Help the account team to understand where individual stakeholders lie, and what is driving their alignment.</p> <p>Provide a sanity check on stakeholder strategies.</p> <p>Support the salesperson as needed in establishing and leveraging more senior contacts.</p> <p>Coach to overcome the resistance to asking for referrals.</p>	<p>Click the course icon below to visit the web page</p>

Customer Success: Renew

TYPICAL ISSUES

Renewal at risk

KEY SKILLS	TOOLS	KEY QUESTIONS TO ASK	OTHER MANAGEMENT ACTIONS	COURSE
<p>Demonstrate the value that has been delivered, using health data.</p> <p>Bring insight to new needs, created by changes to the customer, its own customers and competitors, or external forces.</p> <p>Reaffirm decision criteria with the client, prioritize them, and find out how they now perceive your solution vs. the alternatives.</p> <p>Identify and alleviate any ongoing risks.</p> <p>Achieve commitment by triggering loss aversion, and if necessary, offering low-cost ‘Gives’ in the renewal negotiation.</p>	Renewal Canvas	<ul style="list-style-type: none"> Have you quantified the value created? How have their needs changed? Have their decision criteria changed? Are they perceiving any new risks? Are they just negotiating? And if so, what’s your concession strategy? 	<p>Encourage proactivity as renewal approaches.</p> <p>Help to quantify value, and ask questions to uncover insights into changed needs.</p> <p>Test the current Value Map and challenge their thinking around Value Winners, Killers and Sleepers. Use internal resources or build alliances to create or strengthen capabilities where needed, or to provide senior reassurance to the customer.</p> <p>Help to rehearse the renewal pitch, if appropriate, using the Peak/End Rule.</p>	<p>Click the course icon below to visit the web page</p>

Account Management: Expand

TYPICAL ISSUES

Struggling to expand the account; stuck in comfort zone

KEY SKILLS	TOOLS	KEY QUESTIONS TO ASK	OTHER MANAGEMENT ACTIONS	COURSE
<p>Complete an Account Gameboard, looking at share of wallet across all business units and territories.</p> <p>Create a robust strategy around where to compete in the account, and how to create strategic advantage.</p>	Account Canvas	<ul style="list-style-type: none">• What Autonomous Buying Units exist in this account? Which of our product and service categories are relevant?• What's our share of wallet for each category, in each ABU? Where are the opportunities? The risks?• What's your strategy for each ABU?	<p>Run account planning sessions, focusing on idea generation rather than reporting. Run the Plan-Do-Review cycle on a regular basis</p> <p>Share strategies used to leverage success in one area to open up opportunities in other areas. Ensure salespeople are rewarded for expansion across existing accounts.</p>	<p>Click the course icon below to visit the web page</p>

Account Management: Expand

TYPICAL ISSUES

Unprofitable accounts with too much activity for the revenue, too many discounts or unbilled activity

KEY SKILLS	TOOLS	KEY QUESTIONS TO ASK	OTHER MANAGEMENT ACTIONS	COURSE
Estimate net profit on an account, even with imperfect information. Identify profit leakages, from discounts or a less profitable product mix, to excess sales activity, value adds, and unbilled support. Find ways to minimize these profit leakages.	Account Canvas	<ul style="list-style-type: none">• Have you been able to assess net profit for this account?• What are the main profit leakages?• How could we reduce them, or ask the customer to pay more?	<p>Help the team to gain access to account-level financial information where possible, and to make sensible estimates where not.</p> <p>Run creative problem solving sessions to identify ways to reduce profit leakage.</p>	Click the course icon below to visit the web page

Account Management: Expand

TYPICAL ISSUES

Stakeholders are blocking expansion of the account

KEY SKILLS	TOOLS	KEY QUESTIONS TO ASK	OTHER MANAGEMENT ACTIONS	COURSE
<p>Work with the account team and receptive contacts to understand where individual stakeholders lie, and what is driving their alignment. Map stakeholders, based on their level of influence and alignment to you.</p> <p>Leverage Insight, Influence and Trust to engage supportive stakeholders, neutralise Nemeses and Opponents, and strengthen Champions and Supporters.</p>	Account Canvas	<ul style="list-style-type: none">Who are the main stakeholders relevant to our activity? What's their relative level of influence and perception of us?How can you:<ul style="list-style-type: none">Protect/leverage Champions?Raise the influence of Supporters?Contain Opponents?Convert or Circumvent Nemeses?	<p>Provide a sanity check on stakeholder strategies.</p> <p>Support the salesperson as needed in establishing and leveraging more senior contacts.</p>	<p>Click the course icon below to visit the web page</p>

Account Management: Expand

TYPICAL ISSUES

Too few proactive opportunities identified,
or not making progress on any

KEY SKILLS	TOOLS	KEY QUESTIONS TO ASK	OTHER MANAGEMENT ACTIONS	COURSE
<p>Develop a hypothesis about important customer objectives (KPIs, challenges and wider goals). Consider future objectives using the PESTEL framework.</p> <p>Map capabilities onto objectives to identify and prioritise potential opportunities.</p>	<p>Opportunity Canvas</p>	<ul style="list-style-type: none">• What are the main objectives of the key functions?• Which objectives are hard to achieve?• Who can you discuss that with?• Which objectives could we help with?• Who should you speak to next?	<p>Test the quality of the Value Chain and insights. Put them in touch with colleagues who understand the sector.</p> <p>Help to plan ways to access new areas of decision-making, and to make connections where possible.</p>	<p>Click the course icon below to visit the web page</p>

Lead Generation

TYPICAL ISSUES

Too few proactive opportunities identified

KEY SKILLS	TOOLS	KEY QUESTIONS TO ASK	OTHER MANAGEMENT ACTIONS	COURSE
<p>Develop a hypothesis about important customer objectives (KPIs, challenges and wider goals). Consider future objectives using the PESTEL framework.</p> <p>Map capabilities onto those objectives to identify potential opportunities. Focus on those that are most urgent and important.</p>	<p>Value Chain (Opportunity Canvas)</p>	<ul style="list-style-type: none">• Which objectives are customers struggling to meet right now?• How will those objectives change?• Have you looked beyond your comfort zone functions?• Which of our solutions map onto those objectives?	<p>Test the quality of the Value Chain and insights. Put them in touch with colleagues who understand the sector.</p> <p>Work with Marketing to identify the value proposition for each industry sector.</p> <p>Help to plan account entry and to make connections where possible.</p>	<p>Click the course icon below to visit the web page</p>

Lead Generation

TYPICAL ISSUES

No clear definition of target organization, role, timing or message

KEY SKILLS	TOOLS	KEY QUESTIONS TO ASK	OTHER MANAGEMENT ACTIONS	COURSE
Based on the analysis of the urgent needs we can meet, define targets using Who (functions and roles); Where (company sector or size); What (objectives and capabilities); When (individual and company triggers) and Why (your goal).	Account Entry Canvas (Enterprise deals) Prospecting Canvas (other)	<ul style="list-style-type: none">• Who do you need to engage with? (Functions and roles)• Where are they? (Target market sectors and company size)• What can you engage them about?• When are they going to be most receptive?	Help to bring insight to the most productive targets, based on your experience, the business strategy, and your sales strategy. Make sure the team member has clearly defined targets before they invest time in inbound or outbound lead generation.	Click the course icon below to visit the web page

Lead Generation

TYPICAL ISSUES

Not enough incoming leads

KEY SKILLS	TOOLS	KEY QUESTIONS TO ASK	OTHER MANAGEMENT ACTIONS	COURSE
Identify where your targets spend time online and offline, and build a professional presence. Respond to blogs and discussions, create new content and share content from your own company and third parties.	Prospecting Canvas	<ul style="list-style-type: none">Where do your target prospects spend time? What's your profile there like?Do you plan to respond to questions, blogs, etc.?What content can you create or reshare to build your presence?	<p>Emphasise the power of inbound leads created by sales activity as well as marketing.</p> <p>Follow your team online, and like and re-share their posts.</p> <p>Suggest company or even third-party content that they could re-share</p>	Click the course icon below to visit the web page

Lead Generation

TYPICAL ISSUES

Struggle to engage stakeholders
Generic vs. tailored prospecting

KEY SKILLS	TOOLS	KEY QUESTIONS TO ASK	OTHER MANAGEMENT ACTIONS	COURSE
<p>Assess the number of engagement attempts you need to hit quota.</p> <p>Find, connect with and engage with potential Centres of Receptivity.</p> <p>Use the 3D Advantage (Insight, Influence and Trust) to create tailored and effective communications.</p> <p>Sell the value in a longer meeting.</p>	<p>Account Entry Canvas (Enterprise deals)</p> <p>Prospecting Canvas (other)</p>	<ul style="list-style-type: none">• How many new deals do you need to hit quota? Given your win rate, how many opportunities is that?• What activity level will that require? How are you doing at the moment?• How are you tailoring your approach to each customer, to 'cut through the noise'?• Could any customers give you a referral?	<p>Define target activity levels with the team, then follow-up and track.</p> <p>Work with the team on a few example connection attempts to show the value of a truly tailored approach.</p> <p>Provide material they can use in engaging with their new connections.</p>	<p>Click the course icon below to visit the web page</p>

Lead Generation

SKILL AREA	TYPICAL ISSUES	KEY SKILLS	TOOLS	KEY QUESTIONS TO ASK	OTHER MANAGEMENT ACTIONS	COURSE
Identifying Opportunities	Too few proactive opportunities identified	<p>Develop a hypothesis about important customer objectives (KPIs, challenges and wider goals). Consider future objectives using the PESTEL framework.</p> <p>Map capabilities onto those objectives to identify potential opportunities. Focus on those that are most urgent and important.</p>	Value Chain (Opportunity Canvas)	<ul style="list-style-type: none"> Which objectives are customers struggling to meet right now? How will those objectives change? Have you looked beyond your comfort zone functions? Which of our solutions map onto those objectives? 	<p>Test the quality of the Value Chain and insights. Put them in touch with colleagues who understand the sector.</p> <p>Work with Marketing to identify the value proposition for each industry sector.</p> <p>Help to plan account entry and to make connections where possible.</p>	Click the course icon below to visit the web page
Targeting	No clear definition of target organisation, role, timing or message.	Based on the analysis of the urgent needs we can meet, define targets using Who (functions and roles); Where (company sector or size); What (objectives and capabilities); When (individual and company triggers) and Why (your goal).	<p>Account Entry Canvas (Enterprise deals)</p> <p>Prospecting Canvas (other)</p>	<ul style="list-style-type: none"> Who do you need to engage with? (Functions and roles) Where are they? (Target market sectors and company size) What can you engage them about? When are they going to be most receptive? 	<p>Help to bring insight to the most productive targets, based on your experience, the business strategy, and your sales strategy.</p> <p>Make sure the team member has clearly defined targets before they invest time in inbound or outbound lead generation.</p>	
Inbound	Not enough incoming leads	Identify where your targets spend time online and offline, and build a professional presence. Respond to blogs and discussions, create new content and share content from your own company and third parties.	Prospecting Canvas	<ul style="list-style-type: none"> Where do your target prospects spend time? What's your profile there like? Do you plan to respond to questions, blogs, etc.? What content can you create or reshare to build your presence? 	<p>Emphasise the power of inbound leads created by sales activity as well as marketing.</p> <p>Follow your team online, and like and re-share their posts.</p> <p>Suggest company or even third-party content that they could re-share.</p>	
Outbound	<p>Struggle to engage stakeholders.</p> <p>Generic, vs. tailored, prospecting.</p>	<p>Assess the number of engagement attempts you need to hit quota.</p> <p>Find, connect with and engage with potential Centres of Receptivity.</p> <p>Use the 3D Advantage (Insight, Influence and Trust) to create tailored and effective communications.</p> <p>Sell the value in a longer meeting.</p>	<p>Account Entry Canvas (Enterprise deals)</p> <p>Prospecting Canvas (other)</p>	<ul style="list-style-type: none"> How many new deals do you need to hit quota? Given your win rate, how many opportunities is that? What activity level will that require? How are you doing at the moment? How are you tailoring your approach to each customer, to 'cut through the noise'? Could any customers give you a referral? 	<p>Define target activity levels with the team, then follow-up and track.</p> <p>Work with the team on a few example connection attempts to show the value of a truly tailored approach.</p> <p>Provide material they can use in engaging with their new connections.</p>	

Opportunity Management: Need

SKILL AREA	TYPICAL ISSUES	KEY SKILLS	TOOLS	KEY QUESTIONS TO ASK	OTHER MANAGEMENT ACTIONS	COURSE
Establishing an explicit need	Struggle to engage stakeholders or establish explicit need.	<p>Validate potential opportunities with a Centre of Receptivity (CoR).</p> <p>Identify the Centre of Need (CoN) and meet (with the CoR if appropriate) to confirm their unmet objectives.</p> <p>Ask insightful questions about the barriers to achieving these objectives. Draw on insights from self, others and the customer to uncover the root causes of these barriers.</p> <p>Map your capabilities to the root causes to resolve them.</p>	Need Canvas	<ul style="list-style-type: none"> What customer objectives could you help to achieve? Who owns those objectives? What insights can you offer about their objectives, the barriers to achieving them, or the possible solutions? What are the best questions to ask? Are any other stakeholders affected by the same issue? 	<p>Identify your role in helping the salesperson get meetings at higher levels; determine how your involvement will increase the number and level of contacts in the account.</p> <p>Ensure the salesperson is clear about the goals of this meeting; help them to plan and work collaboratively with internal resources, and to leverage previous successes.</p>	Click the course icon below to visit the web page
Building urgency and momentum	Deal stalled - not enough urgency.	<p>Focus on the objectives that customers are struggling to achieve.</p> <p>Uncover pain at the strategic, tactical, political and individual levels. Contrast with the Gain from your solution (contrast bias). Ask, don't just tell.</p> <p>Use stakeholder analysis to coach client contacts to unblock decision-making and build consensus.</p>	Need Canvas	<ul style="list-style-type: none"> How big is the pain if the customer's objectives are not achieved? How big is the gain if they are achieved? Are there any other roadblocks to achieving consensus? 	<p>Conduct analyses of accounts that have been won and discuss why other customers have decided to buy your solutions</p> <p>Share stories about what they have done for the customer or what was avoided; formalise ways of creating PAIN (e.g., customer requirements analyses) and showing potential GAIN.</p>	
Proving value	Deal stalled - no consensus on taking action.	<p>Quantify the benefits (Strategic, Tactical, Political and Individual), less the costs of buying and using your solution. Work with key contacts to create realistic estimates.</p> <p>Differentiate value in year 1 vs. subsequent.</p> <p>Avoid Single Option Aversion. Consider using decoys to encourage a decision.</p>	Need Canvas	<ul style="list-style-type: none"> Have you quantified the benefits? Have you estimated the costs of buying and using our solution? How much value can be created in the first and subsequent years? 	<p>Help salespeople to create reasonable estimates of impact.</p> <p>Ensure they build and maintain trust by not over-estimating benefits, and by acting as an impartial business equal to their key customer contacts.</p>	

Opportunity Management: Choose

SKILL AREA	TYPICAL ISSUES	KEY SKILLS	TOOLS	KEY QUESTIONS TO ASK	OTHER MANAGEMENT ACTIONS	COURSE
Qualifying & Reframing	Not sure whether to bid.	<p>Assess opportunity attractiveness (deal size and duration, customer attitudes, etc.) and achievability (explicit need, pain, lack of incumbent, access to stakeholders, fit with our proposition, etc.)</p> <p>Pursue achievable and attractive deals, cherry pick a few less attractive ones, and place a few bets on attractive but harder-to-win opportunities. Before rejecting an opportunity, try reframing the need into one that fits better.</p>	Pitch Canvas	<ul style="list-style-type: none"> How attractive is this deal? How achievable is this deal for us? Versus the competition? Versus doing nothing? How do you plan to allocate your time between different opportunities (and other activities such as prospecting)? 	<p>Make sure the team has an objective assessment of attractiveness and achievability – be the ‘conscience’ of this.</p> <p>Help them to make sensible decisions about their time allocation, and when to ‘place a bet’.</p> <p>Help to gain access to senior customer stakeholders to reframe their need if necessary.</p>	<p>Click the course icon below to visit the web page</p>
Creating a Pitch Strategy	Competitive risk or need to displace incumbent supplier.	<p>Uncover decision criteria with the client, clarify and prioritize them, and find out how they perceive your solution relative to the alternatives they are considering. Develop a strategy to deal with:</p> <ul style="list-style-type: none"> Value Winners (important; strong) Value Killers (important; weak) Value Sleepers (unimportant; strong). 	Pitch Canvas	<ul style="list-style-type: none"> What criteria is the customer using to choose suppliers? What are our Value Winners, Killers and Sleepers? How can you protect the Winners, e.g. with hard data? How can you neutralize the Killers, e.g. by improving our capabilities? How can you wake up the Sleepers, e.g. using pain questions to show importance. 	<p>Test the salesperson's Value Map. Challenge their thinking around Value Winners, Killers and Sleepers.</p> <p>Pay particular attention to Value Killers. If aligned with strategy, use internal resources or build alliances to create or strengthen capabilities where needed, or to provide senior reassurance to the customer.</p>	
The Perfect Pitch	Need to deliver a perfect pitch (especially in a virtual setting).	<p>Design a pitch that has positive peaks and a highly positive ending, using the Perfect Pitch model. For example, bring insight to the customer’s need, create a contrasting vision of the future, implement the strategy around decision criteria (Winners, Killers and Sleepers), frame price around value, and avoid single options.</p>	Pitch Canvas	<ul style="list-style-type: none"> Are you using the Perfect Pitch structure? What positive peaks can you build in to the pitch? How can you create a powerful ending? Are you planning to implement your pitch strategy in the pitch itself? 	<p>Test and refine the pitch strategy with the team. Act as the customer in the final run-through. Provide genuine and balanced feedback.</p> <p>Help them to reframe the decision if necessary to focus on your strengths.</p>	

Opportunity Management: Worry

SKILL AREA	TYPICAL ISSUES	KEY SKILLS	TOOLS	KEY QUESTIONS TO ASK	OTHER MANAGEMENT ACTIONS	COURSE
Managing Stakeholders	Some stakeholders prefer a different solution	<p>Work with the account team and receptive customer contacts to understand where individual stakeholders lie, and what is driving their alignment.</p> <p>Map stakeholders, on the basis of their level of influence and alignment to your solution.</p> <p>Leverage Insight, Influence and Trust to engage supportive stakeholders and:</p> <ul style="list-style-type: none"> Protect and Leverage Champions Raise the influence of Supporters Contain Opponents Convert or Circumvent Nemeses 	Risk Canvas	<ul style="list-style-type: none"> Have you identified all the stakeholders who will have a say in this decision? Which are the most influential? How are they aligned? Have you created a stakeholder strategy? 	<p>Provide a sanity check on stakeholder strategies.</p> <p>Support the salesperson as needed in establishing and leveraging more senior contacts.</p>	<p>Click the course icon below to visit the web page</p>
Identifying and Alleviating Risks	Things went quiet after the pitch.	<p>Anticipate and recognise the signs of risk (especially new stakeholders being introduced).</p> <p>Identify potential risks (without creating new ones for the customer) at four levels: Strategic, Tactical, Political, and Individual.</p> <p>Take steps to:</p> <ul style="list-style-type: none"> Correct any misperceptions; Reduce the likelihood of something going wrong (prevention); Reduce the impact if it does (cure). 	Risk Canvas	<ul style="list-style-type: none"> Why do you think things have gone quiet? Have you uncovered any potential risks perceived by the customer? Are there any misperceptions about risk? Can you reduce any risks (prevention)? Can you reduce the impact if the risk materialises (cure)? 	<p>Remind salespeople that when things go quiet, the customer may be talking to a competitor, but may also be dealing with risk.</p> <p>Share issues that typically come up during the late stages of the sales cycle, and the techniques that typically help customers address/manage them.</p> <p>Play a personal role where senior involvement can help to alleviate risk.</p>	

Margin Management: Commit

SKILL AREA	TYPICAL ISSUES	KEY SKILLS	TOOLS	KEY QUESTIONS TO ASK	OTHER MANAGEMENT ACTIONS	COURSE
Profiling Counterparts Managing BATNA	We've been told we're too expensive.	<p>Identify and assess likely negotiation counterparts, leveraging your contacts.</p> <p>Identify the customer's Best Alternative to a Negotiated Agreement (BATNA), using the Kraljic matrix. Identify and strengthen your own BATNA, e.g. using scarce resources on other clients, or making a cut-down offer.</p>	Negotiation Planning Canvas	<ul style="list-style-type: none"> What's your BATNA? Can you improve it? What is the customer's BATNA? Can you quantify how much more value you offer than the next best option? How could you make us seem more differentiated? 	Use your experience of other deals to help profile counterparts and to assess customer walkaways and interests. Help the team to understand that Procurement are trained to create uncertainty and stress, and to stay focused on the customer's needs without becoming confrontational or angry.	<p>Click the course icon below to visit the web page</p>
Anchoring & Framing Uncovering Interests	No clear negotiation strategy.	<p>Anchor (during the pitch) and re-anchor (after the pitch) at just above the customer's likely walkaway point, avoiding the chill effect. Recognise customer anchors and use the appropriate strategy to lift them.</p> <p>Identify full range of customer interests, based on their needs, criteria and risks.</p>	Negotiation Planning Canvas	<ul style="list-style-type: none"> Where should we anchor (close to their walkaway point)? What are their negotiation interests? (consider underlying needs, decision criteria and risk alleviation factors) 	<p>Challenge the team to gather as much insight as they can.</p> <p>Challenge the re-anchor point to balance risk and reward.</p>	
Trading Gives & Gets Managing Stakeholders	Deal at risk, or making too many concessions.	Create a Give/Get matrix showing which interests can be traded off to create value for both parties. When conceding a 'Give', always try to achieve a 'Get' in return. When asked for a concession, use FAST (Frame, Advance options, Signal BATNA, Track Gives & Gets) to minimize value leakage.	<p>Negotiation Interests Canvas</p> <p>Negotiation Trading Canvas</p>	<ul style="list-style-type: none"> What do they care about more than us? What do we care about more than them? Could we create value by offering conditional tradeoffs? 	<p>Encourage proactive planning using the Give/Get matrix.</p> <p>Role-play customer concession requests with the team. Provide support and a source of resilience during the difficult and uncertain aspects of a negotiation.</p>	
Defending Value	Price & terms under attack from Procurement	<p>Recognise Procurement tactics for what they are. Deploy specific response strategies, depending on the approach in use, from Best of Best pricing to future gains, no authority, nibbling and reopening.</p> <p>Leverage receptive stakeholders to gain insight into the customer's true negotiation interests and to influence the process</p>	Negotiation Tactical Canvas	<ul style="list-style-type: none"> Is the pressure you're feeling deliberate? What tactics are Procurement using? How can you remain resilient? Can you label the tactic to help defuse it? What do you know? And how can you find out more? 	<p>Provide support and a source of resilience during the difficult and uncertain aspects of a negotiation.</p> <p>Coach around specific challenges and responses, driving a rigorous approach and avoiding panic.</p> <p>Assist with gaining access to, and insight from, senior customer stakeholders.</p>	

Customer Success: Adopt

SKILL AREA	TYPICAL ISSUES	KEY SKILLS	TOOLS	KEY QUESTIONS TO ASK	OTHER MANAGEMENT ACTIONS	COURSE
Onboarding Implementation and launch	Implementation slow or not going well.	<p>Onboard yourself and the customer. Provide insights into process, risks and KPIs. Define success metrics. Co-develop implementation plans to ensure buy-in and ownership, and manage expectations.</p> <p>Reduce Time to First Value by influencing best practices, creating an effective team culture and cadence, and mobilizing resources as needed. Treat users as customers with their own decision cycle.</p>	Onboarding & Launch Canvas	<ul style="list-style-type: none"> What are the underlying needs that we're meeting? What key decision criteria do we need to excel on? What risks do we need to avoid? What 'Wow moments' are we aiming for? Does the launch follow best practice? What is your meeting cadence? Do you need help mobilizing resources? 	<p>Challenge the CS professional to onboard themselves in the customer first.</p> <p>Share onboarding and implementation plans that have worked effectively for similar engagements. Help the CSM to identify and secure any necessary internal and/or third-party resources.</p> <p>Debrief successful implementations to identify the key stakeholders involved and how they were engaged.</p>	<p>Click the course icon below to visit the web page</p>
Driving adoption Solving problems	Adoption is low	<p>Bring insights into adoption issues & likely strategies to address them. Uncover the root causes of adoption barriers, and use creative problem-solving where necessary (IDEAL).</p> <p>Influence customer stakeholders on change and people issues, not just tactical and technical ones. Manage user Skill/Will/Way.</p> <p>Build trust with accountability and clarity.</p>	Adoption Canvas	<ul style="list-style-type: none"> How is adoption going? What's is the data telling you? What adoption barriers have you managed to identify? Are they issues of Skill, Will, or Way? Depending on the answer, can you help with training, communication or addressing specific Way issues? 	<p>Run root cause analysis sessions for/with the team if necessary.</p> <p>Coach around possible solutions to adoption barriers.</p> <p>Help to mobilise any internal resources or support need to improve adoption, recognising the impact on renewal rates and account expansion.</p>	
Managing customer health Handling difficult conversations	Low value, or value not being recognized.	<p>Track customer results (adoption, impact, ROI) and experience (e.g. effort, CSAT and NPS). Understand which are most important and manage the Health Map by taking action, but also by comparing to trends and benchmarks for the industry.</p> <p>Hold QBR/ABRs that reflect the Peak/End Rule, and handle any difficult conversations in a way that displays empathy, reduces tension, and delivers customer justice.</p>	Customer Health Canvas	<ul style="list-style-type: none"> What's is the data telling you about customer health? What results are they achieving? How is their experience (e.g., Effort, CSAT, NPS)? How can you address health issues? How are you structuring your MBR/ QBR/ABRs? 	<p>Remove any organisational barriers to adequately servicing this customer.</p> <p>Coach the team to manage both the perceived perception of health metrics, and their relative importance, on a regular, proactive basis.</p> <p>Help them to 'look down the runway' at renewal, even if several years away.</p>	

Customer Success: Renew

SKILL AREA	TYPICAL ISSUES	KEY SKILLS	TOOLS	KEY QUESTIONS TO ASK	OTHER MANAGEMENT ACTIONS	COURSE
Building advocacy	Unable to leverage existing relationships for renewal and/or account expansion	<p>Identify current and future Promoters (good experience and results), Detractors (poor on both), Passives (good results but poor experience) and Time Bombs (good experience but poor results)</p> <p>Extend customer focus to the individual. Understand the role of emotional activators in turning Promoters into Evangelists, and create a concrete plan to create trust, good surprises, joy and positive anticipation.</p> <p>Leverage Promoters and Evangelists by asking for internal support (e.g., with renewal), and external referrals.</p>	Renewal Canvas	<ul style="list-style-type: none"> What is our NPS? Are you able to identify which stakeholders are Promoters, Detractors, Passives, or Time Bombs? Are you doing anything to create positive emotions for your Promoters, to turn them into Evangelists? Have you asked for any referrals? 	<p>Help the account team to understand where individual stakeholders lie, and what is driving their alignment.</p> <p>Provide a sanity check on stakeholder strategies.</p> <p>Support the salesperson as needed in establishing and leveraging more senior contacts.</p> <p>Coach to overcome the resistance to asking for referrals.</p>	<p>Click the course icon below to visit the web page</p>
Securing renewal	Renewal at risk	<p>Demonstrate the value that has been delivered, using health data.</p> <p>Bring insight to new needs, created by changes to the customer, its own customers and competitors, or external forces.</p> <p>Reaffirm decision criteria with the client, prioritize them, and find out how they now perceive your solution vs. the alternatives.</p> <p>Identify and alleviate any ongoing risks.</p> <p>Achieve commitment by triggering loss aversion, and if necessary, offering low-cost 'Gives' in the renewal negotiation.</p>	Renewal Canvas	<ul style="list-style-type: none"> Have you quantified the value created? How have their needs changed? Have their decision criteria changed? Are they perceiving any new risks? Are they just negotiating? And if so, what's your concession strategy? 	<p>Encourage proactivity as renewal approaches.</p> <p>Help to quantify value, and ask questions to uncover insights into changed needs.</p> <p>Test the current Value Map and challenge their thinking around Value Winners, Killers and Sleepers. Use internal resources or build alliances to create or strengthen capabilities where needed, or to provide senior reassurance to the customer.</p> <p>Help to rehearse the renewal pitch, if appropriate, using the Peak/End Rule.</p>	

Account Management: Expand

SKILL AREA	TYPICAL ISSUES	KEY SKILLS	TOOLS	KEY QUESTIONS TO ASK	OTHER MANAGEMENT ACTIONS	COURSE
Creating an Account Strategy	Struggling to expand the account; stuck in comfort zone	<p>Complete an Account Gameboard, looking at share of wallet across all business units and territories.</p> <p>Create a robust strategy around where to compete in the account, and how to create strategic advantage.</p>	Account Canvas	<ul style="list-style-type: none"> What Autonomous Buying Units exist in this account? Which of our product and service categories are relevant? What's our share of wallet for each category, in each ABU? Where are the opportunities? The risks? What's your strategy for each ABU? 	<p>Run account planning sessions, focusing on idea generation rather than reporting. Run the Plan-Do-Review cycle on a regular basis</p> <p>Share strategies used to leverage success in one area to open up opportunities in other areas. Ensure salespeople are rewarded for expansion across existing accounts.</p>	<p>Click the course icon below to visit the web page</p>
Managing account profitability	Unprofitable accounts with too much activity for the revenue, too many discounts or unbilled activity.	Estimate net profit on an account, even with imperfect information. Identify profit leakages, from discounts or a less profitable product mix, to excess sales activity, value adds, and unbilled support. Find ways to minimize these profit leakages.	Account Canvas	<ul style="list-style-type: none"> Have you been able to assess net profit for this account? What are the main profit leakages? How could we reduce them, or ask the customer to pay more? 	<p>Help the team to gain access to account-level financial information where possible, and to make sensible estimates where not.</p> <p>Run creative problem solving sessions to identify ways to reduce profit leakage.</p>	
Managing Stakeholders	Stakeholders are blocking expansion of the account.	<p>Work with the account team and receptive contacts to understand where individual stakeholders lie, and what is driving their alignment. Map stakeholders, based on their level of influence and alignment to you.</p> <p>Leverage Insight, Influence and Trust to engage supportive stakeholders, neutralise Nemeses and Opponents, and strengthen Champions and Supporters.</p>	Account Canvas	<ul style="list-style-type: none"> Who are the main stakeholders relevant to our activity? What's their relative level of influence and perception of us? How can you: <ul style="list-style-type: none"> Protect/leverage Champions? Raise the influence of Supporters? Contain Opponents? Convert or Circumvent Nemeses? 	<p>Provide a sanity check on stakeholder strategies.</p> <p>Support the salesperson as needed in establishing and leveraging more senior contacts.</p>	
Identifying & Prioritising Opportunities	Too few proactive opportunities identified, or not making progress on any.	<p>Develop a hypothesis about important customer objectives (KPIs, challenges and wider goals). Consider future objectives using the PESTEL framework.</p> <p>Map capabilities onto objectives to identify and prioritise potential opportunities.</p>	Opportunity Canvas	<ul style="list-style-type: none"> What are the main objectives of the key functions? Which objectives are hard to achieve? Who can you discuss that with? Which objectives could we help with? Who should you speak to next? 	<p>Test the quality of the Value Chain and insights.</p> <p>Put them in touch with colleagues who understand the sector.</p> <p>Help to plan ways to access new areas of decision-making, and to make connections where possible.</p>	