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### Stunningly Successful Methodology Implementation – Best (and Worst) Practices

This article includes:

- A methodology for methodology success
- Examples of what *not* to do (so that you don't)
- Discussion and identification of key success factors and metrics
- The importance of establishing a baseline and how to do it
- The nature of the Three Groups and methodology adoption
- Virtuous feedback cycles, their impact and importance
- The Manager's Dilemma and how to avoid/address it
- What about Bob? Other impacted and impacting teams
- A few coaching guidelines for adoption
- Keeping it rolling – systems, tools, new hires and ongoing adoption
- A methodology for methodology success

This article was specifically written for:

- Presales managers and mentors (guidance on implementation and coaching your team)
- Presales individual contributors (read the article as if you were coaching yourself)
- Anyone contemplating implementing a sales or presales methodology (especially senior management)

#### A Methodology for Methodology Success

Take a deep breath – this is a long article. Here are the key take-aways we'll address:

Prior to the first training sessions:

0. Be clear on your overall objectives
1. Make sure you understand what *doesn't* work
2. Discuss and agree on key success factors and the metrics
3. Establish a baseline
4. Train front-line managers and mentors on coaching
5. Introduce the front-line managers and mentors to the methodology
6. Ensure that front-line managers and mentors take the training
7. Address and enroll other impacted and impacting teams

Immediately after the first training sessions:

8. Re-establish a baseline
9. Tune the training and course material
10. Assess the trainees in terms of the Three Groups
11. Push/Pull, Poll and Publish to establish virtuous feedback cycles
12. Address and enroll the balance of the other impacted teams

And on an ongoing basis:

13. Keep It Rolling – implement in internal systems and for onboarding
14. Gather front-line managers and mentors to identify issues and opportunities
15. Continue to Push/Pull, Poll and Publish
16. Track the KPI's and metrics, assess, refine and execute!

### **What *Not* to Do...**

To paraphrase Voltaire, common sense in methodology implementation – is far too uncommon! Contemplate the following scenario:

- You train a large team in a new methodology...
- But you don't train the team's managers in the methodology – or how to coach their team members on how to apply the methodology,
- Nor do you train the team's colleagues or mentors in the methodology – they are unexposed and expect to continue with their current practices.

Before reading further, look away from this article and forecast the results. What will happen?

Would you predict stunning success, significant change, and critical improvements in key performance indicators and metrics? Or would the team likely return to their old practices?

[Hint: Choose the second option]

So, let's talk about *successful* implementation of methodology training. In many cases, we'll use Great Demo! methodology as a working example, which we'll call out with the notation, "**GD!**".

### **Key Success Factors**

Before identifying specific KPI's, consider the following general plan:

1. Determine what to measure, then establish a baseline and track progress.
2. Run a pilot training session or two, then refine.
3. Ensure that front-line managers are trained with their teams.
4. Train the front-line managers on key coaching elements – and on how to coach.
5. Track progress; tune, adjust, and reinforce as appropriate.

Note: this all *presupposes* active support by senior management...

Equally important additional note: many organizations only consider the first two items on this list and part of item 5. Executing 3 and 4 are key success factors on their own (as illustrated by the sad example above).

### **Determine What to Measure...**

Key Performance Indicators need to be exactly that: key indicators of the performance of the team resulting from the training. You might want to think in terms of two dimensions:

1. Adoption of the methodology
2. Effectiveness of the methodology

Note that these are two *very* different KPI's! And far too many times only the second KPI (Effectiveness) is measured. Here's an example...

You train the team in a specific sales methodology and you choose to track "Sales Cycle Length", "Deal Size" and "Forecast Accuracy" (% of deals moving from stage to stage as forecasted). Prior to the training you establish a baseline. Six months later you review the progress of these three KPI's and you see no significant change.

Was the methodology at fault? Hard to tell...!

You have no idea whether the team actually *adopted* the methodology and put it into practice or simply reverted to their old ways. (This often happens with sales methodology training when it is perceived as "the methodology of the year...")

Accordingly, we need to measure and track both Adoption and Effectiveness. For Adoption, we need to understand what are key indicators of adoption and thus how best to measure it.

**[GD! For Great Demo! Adoption, we often suggest requesting and then tracking the generation of Situation Slides and Illustrations as key indicators. Some organizations today require submission of Situation Slides by sales prior to assignment of presales resources for demos (and POC's). Completed Situation Slides also indicate whether adequate Discovery was completed prior to a demo. Submitted Illustrations show that the presales resource likely applied some key Great Demo! concepts when preparing the demo.]**

Next, let's look at Effectiveness metrics. Clearly, you must choose wisely – since what you measure will (generally) drive behavior!

**[GD! For Great Demo! Effectiveness, we recommend tracking sensitive ratios such as:**

1. (\$'s of) Revenue/Demo Overall
2. (\$'s of) Revenue/Demo by geography and/or by team
3. (\$'s of) Revenue/Demo for individual presales people
4. (\$'s of) Revenue/Demo for individual sales people

Over the period of a few quarters, you will likely uncover a number of potentially surprising trends...

For example, overall performance of the team is shown by an increase over time of the first metric (assuming other contributing factors remain the same, of course). Similarly, you will likely find that certain teams or geographies are doing better or struggling, comparatively, yielding opportunities to coach/refresh skills – and the metric for individual presales team members also provides performance insights on an individual basis.

Using this metrics to track sales people will show which sales people are using presales resources most effectively vs. those needing coaching (or to be moved along...).

[Background story: The use of this metric was established by a colleague of mine who was then managing a presales team. There was one sales person who always had a "huuuge opportunity" and

consumed an overlarge amount of presales resources, but never seemed to close the amount of business that his colleagues did. However, without hard data to present to that sales person's manager, the problem simply continued (as did the perception that presales' resource/time was somehow "unlimited" ...).

By collecting this data, my colleague was able to show conclusively that this sales person was an anomaly, compared to his peers – and my colleague was able to convince sales management to make the necessary change. My colleague is currently the very successful head of sales at a major laboratory informatics company, enjoying very strong growth in his business!]

**[GD!** Here are a few other metrics to consider tracking, along with comments:

High-level Metrics – these track the Effectiveness of the methodology overall:

1. # of Demos per Order: A good metric when deal size can be normalized and when current (pre-Great Demo! Workshop) sales cycles tend to require multiple demos. This metric may need to be "sliced and diced" when trying to compare sales cycles between multiple products and "Land and Expand" scenarios.
2. % of Demos Delivered with Sufficient Discovery: Tracking whether complete Situation Slides were in place prior to a demo is a great way to assess the degree of Discovery done (and communicated!) prior to a demo vs. how many demos are simply "Harbor Tours" delivered with little or no Discovery.
3. "No Decision" Rates: Complete Situation Slides also reduce the likelihood of a "No Decision" outcome. Tracking "No Decisions" offers a separate mechanism to determine the effectiveness of the methodology (but you need to track both "No Decisions" and submission of completed Situation Slides together for this to be applicable).
4. % of Orders Requiring a POC: A well-prepared Great Demo! (Technical Proof demo, specifically) often *eliminates* the need for a POC. This metric can provide insight into the effectiveness of the methodology and, over time, the nature of the customer population (Early Adopter vs. Early Majority vs. Late Majority, for example).
5. % Wasted Demos: This is another way to assess efforts to complete sufficient Discovery vs. situations where sales people simply say, "Show 'em a demo...!" (Gee, does that ever happen?). Careful, though, you'll want to find a simple way to differentiate a "Show-up-and-throw-up demo" from a Great Demo! – the presence of a complete Situation Slide is one simple measure.]

Customer Success Metric:

6. V.R.E. Realization Rates: This can be a *very* useful and compelling metric to track. V.R.E. (Value Realization Events) are those "early wins" that take place post-implementation for customers. Tracking (1) whether a V.R.E. was identified, (2) whether it was achieved and (3) when it was achieved vs. plan, will yield terrific data that can be mapped to churn (or reduced churn).

**[GD!** In Great Demo!, we teach sales and presales teams to identify and track V.R.E.'s with customers – and include the V.R.E. as one of the 6 elements of a Situation Slide.]

[Demo-level Metrics – these track the Effectiveness some of the key elements of the Great Demo! methodology:

7. Demo Length (minutes): Generally, Great Demos are substantially shorter than traditional demos. A subtlety here is to track demo meetings that *don't* run exactly 1 hour or other traditional time length – Great Demos take only as long as is needed – no more, no less...
8. Time Between Customer Questions or Comments: This can be a terrific measurement of customer engagement. Most traditional demos have the presenter talking for 3-5 minutes (and as long as 8-10 minutes) before asking, “Any questions so far...?”, followed by, “Nope; we’re good...” from the customer. A Great Demo! should see a customer interaction every minute or two.
9. Positive Feedback from Sales: The number of these can be a good indicator of progress (but used carefully, of course).
10. Positive Feedback from Customers: Similar, but ever better...!
11. And, of course, “ride-along” tracking of the use and presentation of Situation Slides, Illustrations, Do It and Peel Back the Layers pathways, along with managing questions and other Great Demo! elements.

Note that tracking these metrics provides terrific material for managers’ coaching... (You are welcome to a copy of our Great Demo! Coaching Guidance document to serve as a template – [email us](#) for a copy)].

### **Establish a Baseline...**

You can’t honestly evaluate the success of a methodology implementation unless you take and track measurements. And you can’t evaluate change if you don’t establish a baseline (yet, surprisingly, baselines are rarely established!).

This means that you need to:

1. Determine what metrics to track well *before* you begin methodology training and
2. Make an assessment of these metrics prior to beginning training so that you *have* a baseline.

[**GD!** Prior to a Great Demo! Workshop, a customer asked for some ideas regarding implementation. Her starting point was an assessment form to document her team’s current level of practice/performance.

I told her that the assessment form is a terrific starting point... I then rather strongly recommended a few (well, several) additional ideas to track progress:

1. Establish metrics to track for individuals and teams before and after training (as above).
2. Have your front-line managers assess their presales staff at least once *before* the Great Demo! training so that you can establish an initial “baseline”.
3. Have your managers (who also need to join the training) then assess their presales staff again *immediately after* the training to establish a normalized baseline (see below for the rationale). It is also good to have discussion sessions about the differences in perspective pre- and post- training.

For Number 2, I put “baseline” in quotes, because prior to the training, managers and individual contributors often rank their performance *better* than immediately after a Workshop – they “don’t know what they don’t know” prior to the training. You should then establish a second, post-Workshop baseline (Number 3 above) from which forward progress can be measured.]

OK, you’ve got your metrics identified and you’ve established your (initial) baseline. Let the training commence...!

## The Three Groups

Teams that go through any methodology training (sales, demos, etc.) tend to partition into three Groups:

Group 1: Those who “get it”; the new ideas resonate with them; and they are comfortable and sufficiently confident to try out the new concepts on their own.

Group 2: Those who understand what they’ve learned; it largely resonates; but they are concerned about making any substantive changes to their processes. They are insufficiently convinced to try the new ideas themselves – they need to see success with their peers, first.

Group 3: Those who say something like, “I’ve been selling/marketing/doing demos for 20 years – you can’t tell *me* how to do it...!” Attrition is the solution for this Group...

Group 1 are the methodology early adopters. The new ideas make sense, they can see the value, and they are often eager to put the new ideas into practice. This Group is typically 10-20% of the total.

Guidance for their managers? Actively support this Group, remove obstacles, and celebrate and rebroadcast their successes – establish a virtuous positive feedback loop.

Group 2 are the methodology adoption “majority” – often 60-80% of the overall team. They understand the new thinking, it makes sense, but they don’t want to try something new without seeing proof that it works for others similar to them. This Group represents one of the biggest challenges to methodology adoption.

Guidance for their managers? Actively seek-out and rebroadcast success stories from the Group 1 folks – particularly *early* success stories. The objective is to convince their Group 2 colleagues that the method *works* – and that it works for the people they respect and relate to – their immediate peers. This gives the Group 2 people confidence that the new ideas may also work for them, as well. Proof.

Group 3? Sigh... No amount of training or other, non-punitive efforts will change the minds of this stubborn, Luddite-like Group. The solution? Attrition... (In sales, they can stay as long as they make their numbers, generally, if they are not negatively impacting the balance of the team).

Individual contributors: which group do you fall into?

This suggests that Group 2 represents the greatest risk and biggest opportunity. Organizations that causatively take action to move Group 2 members into day-to-day practice enjoy the highest levels of adoption and return on investment in methodology training.

So what steps are effective in accomplishing this?

1. First and foremost is recognizing that the three Groups exist and identifying who sits in each Group.

[**GD!** Great Demo! facilitators can (and should) offer insights into who will likely sit in each Group – this is a discussion that should happen as part of a post-Workshop debrief.]

2. Capturing and rebroadcasting success stories has an enormous positive impact. This needs to be done as a scheduled, regular process, particularly over the first several months post-training.

[GD! There are a number of actions that are taken as part of Great Demo! adoption, including:

- i. Post-Workshop regular emails from the facilitator (that poll for success stories)
- ii. Joining periodic team calls to promote success stories, address questions, and discuss new situations
- iii. Ongoing coaching for participants
- iv. Coaching for managers and mentors (on how to coach – more on this ridiculously important topic later...)
- v. Reviewing Situation Slides and Illustrations for upcoming important demos
- vi. Doing practice sessions before upcoming important demos]

12. Setting objectives (and measurements) that both support the method and serve to drive its adoption.

[GD! Successful organizations have implemented the following for Great Demo!:

- i. Require reasonably complete Situation Slides prior to assigning presales resources for demos
- ii. Capture and share Situation Slides and Illustrations from successful demos]

### **The Three Groups - Revisited**

Adopting a methodology generally means making substantial changes to one's practices – but change is challenging! Group 1 tends to be more comfortable with large changes; Group 2 typically is more likely to try small steps (and let's not concern ourselves with Group 3 anymore).

With many methodologies, the easiest ideas to implement often have the *least* impact; conversely, the ideas yielding the greatest impact may be the *toughest* to put into practice.

The guidance here is to contemplate:

1. Which team members partition into Groups 1 and 2, respectively, and therefore
2. What strategy to take when encouraging and coaching adoption for each individual.

Very simply, the Group 1 folks will be much more willing to make big changes and try out some of the more challenging aspects of the new practices; Group 2 members will likely need to start with smaller, easier-to-implement changes.

One way to look at this is to use a four-quadrant grid, with the Y axis identifying the level of gain or pay-back and the X axis showing the implementation or adoption effort:

High Pay-off	High Pay-off High Effort	High Pay-off Low Effort
Low Pay-off	Low Pay-off High Effort	Low Pay-off Low Effort
	High Effort	Low Effort

When you populate a graph like this with the key skills and practices of the methodology, you have a tool you can use to provide coaching guidance to individual team members. Folks who want the “biggest bang” for their efforts will be directed to the top-right quadrant; Group 1 members will be more likely to also work on items in the top-left quadrant. (And all should avoid, as possible, the bottom-left quadrant...)

**[GD!** Looking at Great Demo! practices, we can rapidly assess effort vs. pay-off for a number of items:

Low Effort, High Pay-off:

1. Fewest Number of Clicks
2. “You” Mode
3. Preparing Situation Slides, based on existing “Discovery” information (likely incomplete)
4. Precise pointing

Moderate Effort, High Pay-off:

1. Completing Situation Slides (which may require executing more Discovery)
2. Identifying and presenting compelling Illustrations
3. Peeling Back the Layers
4. Transition Vision and V.R.E. discussions
5. Communicating and connecting to the Business Value (the Delta) throughout the demo
6. The Menu Approach
7. Vision Generation Demos

High Effort, High Pay-off:

1. Preparing and delivering Complex Situation Demos (e.g., for multiple stakeholders, multiple solutions)
2. Reaching agreement with the customer on success criteria, the timeline and the players for a POC
3. Deeper Discovery skills (e.g., from a Great Demo! Master Class)

Low Effort, Moderate Pay-off:

1. Remote Demos practices
2. Color, xy graph and related Illustration presentation tactics
3. Managing Questions

4. Smooth and deliberate mousing
5. Summarizing
6. Making Demos Remarkable elements (e.g., visual aids, whiteboard work, storytelling...)
7. Letting the customer drive (requires more courage than effort!)]

### **Virtuous Feedback Cycles**

Overall, what causes a major methodology implementation to succeed or fail? Feedback.

If the feedback is positive, more Group 2 members will be willing to try out the new practices. If the feedback is negative, Group 2 will stay away from the new ideas. Interestingly, Group 2 will *also* fail to try the new skills if there is no feedback or if the feedback is neutral (and, of course, if the feedback is negative).

No feedback is an adoption kiss of death: Group 2 member says, “Well, I haven’t seen or heard anything about the new methodology, so I guess nobody is using it...” (ever heard that before?). Group 2 members won’t give it a try, in spite of any successes with the Group 1 folks (no feedback, no way of knowing about any successes).

In the case of neutral feedback, as in “Yeah, I tried it, but it didn’t seem to make a difference...”, this is just as bad as negative feedback. Group 2 members will stay with their current practices, as will the Group 1 member who made the comment. After all, why invest effort to change if the results are indifferent?

And that’s a key – the results need to show tangible gains.

Group 2 – often 60-80% of those trained – may not (will likely not) embrace a new methodology without seeing success with their peers using it. If they see no feedback at all or neutral feedback, adoption of the new methodology is at risk (severe risk, in fact!).

A solution? Push/pull, poll and publish...

### **Push/Pull, Poll and Publish**

Push and Pull for feedback; Poll for success stories and Publish success stories broadly.

The first few months after initial training are typically the most critical. Members of Group 1 try out some of the new ideas and often have good results. However, if the Group 1 individuals are the only ones who know about their successes, adoption will lag – and will likely not go beyond those in Group 1.

Push and Pull everyone for feedback on the program – the recently-trained staff, managers, executives (even customers). Let everyone know you will be asking for results. Poll frequently – particularly those in Group 1 – and when you hear of a success story, get the details (sanitize as appropriate) and *Publish it broadly*.

Shout out small successes, moderate gains, and (of course) major victories!

Reward the courage of the Group 1 folks by re-broadcasting their successes throughout the team. This will generate a positive feedback loop for the Group 1 members, encouraging more to report their successes.

More importantly, these success stories will encourage Group 2 to try out the new ideas. “If it worked for Mike and Barbara, maybe I should give it a try...” And when Group 2 people begin to report their own successes,

these (oh, especially these!) need to be published and re-broadcast. Each member of Group 2 that reports a success (however small) represents a step towards substantive adoption.

A virtuous cycle is the objective – and the result!

Over time, those who have *not* tried the methodology (and reported success) become the *minority* – causing even more pressure to adopt.

**[GD! For Great Demo!, here are a few examples of Push/Pull, Poll and Publish:**

Push/Pull:

1. Push out weekly emails from team managers to those just trained, “How is it going? Any success stories to report? Any questions on the ideas or new situations you’d like to discuss?”
2. Pull for feedback in the regular team calls (same types of questions as above).
3. Require or request Situation Slides for each demo delivered (some organizations *require* complete or nearly complete Situation Slides prior to delivering any substantive demo).
4. Similarly, require or request Illustrations prior to demos.
5. Push sales people to both try the new methods and provide feedback. Pull for their feedback.
6. Pull presales staff who enjoyed successes to contribute their Situation Slides and Illustrations into a shared area to enable others to leverage these successes with other customers in similar situations.
7. And use these latter as feedstock for Vision Generation Demos.

Poll:

1. At regular (and frequent) intervals, initially, Poll for feedback. “How is it going? Any success stories to report? Any tips on what has worked, in particular? Any questions on the ideas or new situations you’d like to discuss?”
2. When we at Great Demo! facilitate a Workshop, we follow-up with similar emails at 1 month, 2 months, 3, 4, 6, 9 and 12 months post-Workshop date, to provide another “Polling” pathway.
3. Assess and review the metrics you’ve decided to track on a regular cadence (monthly, for example) – and Publish the results to front-line managers and their individual contributors – everyone who was trained and/or involved. They need to take personal ownership, as much as possible, of the progress made and results earned.
4. Poll your salespeople for *their* impressions – and Publish as appropriate.

Publish:

1. Publish all successes, no matter how small (to start with).
2. Publish Situation Slides and Illustrations from successful demos – “Here is what Deborah used to close the deal with DeLight Corporation...”
3. Publish any methodology usage tips that come in...
4. Publish Menus that have been particularly successful.
5. Publish Vision Generation Demo components (Situation Slides and Illustrations).
6. Publish examples of what a “Great Demo!” looks like – you can use [Refract.ai](#) as a terrific tool to accomplish this.
7. Publish examples of a what great Discovery session sounds like.
8. Great Story: After the first day of a 1.5-day Great Demo! Workshop, one of the participants reported a major success applying the ideas – she was able to literally snatch victory from the jaws of defeat and turned a potential loss into a major victory. The wonderful thing about this is that she reported her success right at the start of day 2. What do you think the impact was on the balance of the team?]

Hmmm... You might have noticed that there is some real work involved here. You really can't expect to have some methodology vendor come in, deliver a day or two of training, and then expect your team to adopt the new ideas right away?

Nope. It takes a plan, resources, and energy to see serious adoption of any methodology.

### **What *Not* to Do – Revisited – A Top-Ten Eleven *Don't* List**

The ideas above should alert us about additional unsuccessful practices for methodology adoption, including (but not limited to):

1. Making the training another HR "Check-box" – "We deliver it and we're done..."
2. Don't have front-line managers participate in the training
3. Don't teach front-line managers how to coach their teams
4. Don't have top-level management drive or support
5. Don't have sufficient infrastructure in place to support and track (e.g., CRM and Customer Success Management systems able to track the appropriate metrics)
6. Don't make it part of the culture
7. Don't highlight successes
8. Don't review regularly (e.g., weekly team calls)
9. Don't establish and track key metrics
10. Don't introduce the methodology to other impacted or related teams
11. Don't Push/Pull, Poll or Publish

Wait a moment – what is that in items 2 and 3 above? This could be important...!

### **Front-line Managers and the Manager's Dilemma**

The Good, the Bad, and the Truly Ugly – see if this sounds familiar:

A manager organizes skills training for his team. On the day of the training, the manager kicks things off and then disappears. Assuming that the manager has not taken this particular skills training previously, what's wrong with this picture?

1. It is unlikely that this manager will be able to coach or provide guidance to his team on the specific skills, reducing that manager's ability to achieve one of his biggest goals – to grow and develop the team,
2. And in the case of methodology adoption, our manager will be unable to coach to the new skills and concepts to *achieve* adoption. Trainees will be on their own...

Accordingly, we can categorize managers into three groups:

The Good: Those who actively participate in skills training (and are therefore enabled to coach their teams).

The Bad: Those who attend the skills training session, but who spend 90% of the time reading and writing emails, often with noisy, "clacky" keyboards (and are unconsciously telling their teams that the skills being learned are not sufficiently important for the team's attention, either).

The Truly Ugly: Those who don't attend at all (and are therefore unable to coach or support their teams).

The moral? Managers should embrace skills training with the same (or deeper) commitment and "presence" that they expect from their teams...

There is, of course, a "Great" category for managers as well: those who attend the training, pay rapt attention, support and reinforce the ideas during the training, and then take steps to learn how to coach their team...! Not surprisingly, we see some of the greatest success in both adoption and ongoing execution when "Great" managers are involved.

[GD! As facilitators, we are truly *delighted* when we have a "Great" category manager in a Workshop – it is a leading indicator of successful adoption and execution.]

Let's see how this all plays into adoption of a new methodology...

As an individual contributor:

You just completed a training class on a new methodology and have tried some of the ideas in your recent interactions with customers – but you aren't sure you are doing the new practices correctly. You call your manager and ask for help, but realize that your manager has very limited understanding of the new ideas and vocabulary. What do you do?

As a manager:

You receive a call from one of your most promising team members who is asking for help with a recent customer interaction – and you suddenly realize that you don't really understand the issue, the vocabulary, and (especially) how to help. What do you do?

The Manager's Dilemma results from the following very typical scenarios:

1. "I haven't been trained on the methodology..."
2. "I didn't have time to join the session because I'm *super busy*..."
3. "I don't *need* to be trained on the ideas, since I *am* a manager." [This logic shouldn't compile, yet it often does...]

Simply stated, the Manager's Dilemma is a manager being charged to coach and achieve certain adoption and execution metrics with their team – but being unable to do so because the manager literally doesn't know what to do. This yields two observations:

1. Exposure: Managers who haven't personally experienced the methodology *and* the training will be unable to coach or guide their teams – and adoption will fail.
2. Coaching Skills: Managers who haven't been trained on *how to coach* will also be unable to coach and guide their teams – and adoption will struggle (at best).

Front-line managers of sales and presales teams are the point(s) of leverage with respect to implementing change in a field organization: senior management can mandate, enablement can enable, staff members can

adopt or not on their own; it is often up to the buy-in, coaching and drive-for-performance of front-line managers to see the desired gains achieved.

But wait: there's more...

### **The Manager's Dilemma and Coaching**

What about the ability to coach – have front-line managers been trained on *how* to coach? Is the *ability* to coach somehow automatically “switched on” when the “Manager” title is added to one’s business card?

Nope.

1. Managers’ Dilemma: I don’t know how to coach; I haven’t been trained on what or how to coach.
2. Managers’ Circular Reasoning Dilemma: Since I *am* a manager, I should know how to coach my team (even if I don’t).

Do managers typically participate in the training classes their teams go through? Unfortunately, often not! This propagates the negative cycle...

3. Managers’ Dilemma: I can’t coach what I don’t understand...

Solution? Part of any reasonable employee development plan should include resources and skills training on how to coach their teams. This needs to be taught and learned; it will not typically come “naturally”.

[**GD!** For Great Demo!, we offer specific training for front-line managers and mentors on how to coach along with specific coaching instructions for the various elements of the methodology. (Contact us for a copy of the Great Demo! Coaching Guidance document, for example).]

### **The Manager's Dilemma and Buy-in**

This can be a huge issue!

A manager can strongly concur with a methodology, for example, but use a different vocabulary from what was taught in a class, causing confusion. Worse, a manager may only agree with portions of the training (and ignore other pieces), potentially resulting in deeper confusion.

Similarly, some managers may simply not understand portions of the training. Worst of all, perhaps, are managers that simply disagree with the main body of the training material – and choose to follow another pathway entirely.

4. Managers’ Dilemma (that becomes the Team Members’ Dilemma): I’ll use my own vocabulary
5. Managers’ Dilemma (and Team Members’ Dilemma): I only support what I like (or know, or feel comfortable with using)
6. Managers’ Dilemma (and Team Members’ Dilemma): I don’t care that the company has committed to methodology “X”, I like “Y” and that’s what *my* team is going to use...

Solutions:

1. Obvious (but strangely not consistently done): Managers need to actively participate in sales and related skills training – with their teams.

A number of sales methodologies *require* the use of managers as “coaches” in their training classes to reinforce/support the training and as a mechanism for enabling ongoing coaching.

2. Train managers on how to coach and what to coach.

This is also rather obvious, but is comparatively rarely done. Skills trainers typically assume that managers already know how to coach – this is potentially a huge gap. Trainers can provide information on what to coach for, but often have to rely on individual managers’ ability to execute the coaching.

Interesting small example: some years ago, I volunteered to help coach my daughter’s elementary-school-age soccer team. Before we did anything with the kids, all of the new coaches in the league were required to get certified *as* coaches – this meant we had to learn (or relearn) the rules of the game and we had to learn how to coach and what to coach.

I was surprised at the depth of learning and skills that were necessary to be an effective coach for the team, ranging from set-up and execution of soccer skills practice, to position decisions, to working with the referees, to orchestrating snacks and drinks – and the toughest challenge overall: dealing with the parents (and parents’ expectations and perceptions).

3. Manager success stories: Just as managers can publicize individual team members’ success stories to help drive other employees to implement new ideas, senior managers can use front-line managers’ success stories to help drive change amongst their peers and teams.
4. Mentors: The use of mentors is a terrific approach to broadening the set of coaches available to any specific team. Mentors are often senior team members that are both skilled in applying the method and in coaching – and are typically for bringing new hires up to speed or between teams.
5. On-boarding: The loss of key team members or managers who are replaced by new hires that have not been exposed to the training causes a double dilution effect: the team is losing a skilled, trained player (or coaching manager) and gains an un-enabled replacement. Senior managers who recognize this problem move to train their newly hired managers as rapidly as possible; newly-hired staff are typically exposed to the next possible round of training and, when possible, assigned a mentor as a coach.

### **Coaching – Yourself or Your Team**

Training on how to coach would be great topic for another article – but for now, here are a few thoughts:

1. Identify a few of the key, high-yield, high-impact elements in the methodology to focus on.
2. Select just *one*...
3. Practice, get feedback and repeat until it becomes consistent and embedded
4. Repeat 1 through 3

There are a few subtleties here:

1. It can be very hard to adopt a full methodology all at once – most people cannot possibly accomplish this. It is truly like trying to drink from a firehose. Accordingly, target one new skill at a time and work at it until it becomes part of the natural process. Then, select the next element to adopt.
2. Working on one item at a time also provides the opportunity for small (and continuous) personal victories, encouraging forward progress.
3. “Get feedback...” This means that the new practitioner *needs* a coach – someone who understands what “good” or “great” look like and how to move the practitioner towards those goals.

**[GD! For Great Demo!, here are a handful of high-value, high-impact skills to choose from:**

1. Generate and use Situation Slides
2. Develop and present Illustrations
3. Break up your content into short, discrete chunks
4. Use the Fewest Number of Clicks
5. Remember to Summarize

Each of these will significantly contribute to substantially improved demos.]

### **What about Bob? Other Impacted and Impacting Teams**

Most sales (and other) methodologies are targeted primarily for specific teams – for example, sales methodology focuses primarily on quota-carrying sales people. However, most methodologies cannot exist in a stand-alone state – they require that other interconnected portions of the organization understand the key elements and play their appropriate roles.

With sales methodologies, there are clearly a number of directly impacted departments, including:

- Sales Operations: who often must implement the methodology in CRM systems
- Sales Enablement: who are generally organizing the training and may also define and track metrics
- Marketing: who need to learn the “language” and produce marketing materials that align with the methodology (the Challenger model is an excellent example of the interdependency between sales and marketing - marketing is charged to generate “Commercial Insights” that sales uses with prospects)
- Presales: who need to understand the methodology and likely apply portions of it (but not all of it)
- Inside Sales and Business Development: who also need to understand the methodology and apply portions of it, as well
- Customer Success: who need to harvest key outputs of the methodology as inputs into Customer Success programs
- Senior Management: who, of course, want to see substantive positive change towards the goals

**[GD! While Great Demo! is perceived, initially, as a presales methodology, the greatest successes occur when sales are trained simultaneously with their presales counterparts. In fact, the most successful outcomes take place when sales and presales team members sit together in Workshops – it is a “team sport”:**

- Best Approach: presales and their corresponding sales counterparts sit together to form the role-play groups in a Great Demo! Workshop. This yields the greatest, swiftest returns on investment.

- Good Approach: presales team(s) are trained first, followed closely by introducing the methodology to sales (and the role of sales in Great Demo! as a key part of this).
- Least Effective Approach: presales team(s) are trained, but not sales. This makes it much tougher as individual presales folks often need to train their sales counterparts on the methodology (and the sales folks may “push back” as they have not been exposed to the rationale...).

A number of very successful Great Demo! implementations include 1- or 2-hour introductions to Great Demo! in their sales and presales onboarding “boot-camps” – followed by more extensive sessions for presales.

Similarly, other organizations take advantage of sales kickoff meetings and quarterly reviews (lovingly known as “Quarterly Management Inquisitions”) to introduce and reinforce Great Demo! A particularly powerful approach is to highlight a few success stories at these events (Push/Pull, Poll and Publish).]

Another consideration is that “Bob” is the *new* methodology – and it needs to take into account *existing* processes and vocabulary that are already in place within an organization. For example, many companies have strict definitions for words such as “customer”, “client” and “prospect”. Any new methodology needs either to subscribe to the existing “controlled vocabulary” or know that replacing existing terms will be part of the implementation process.

[GD! When implementing Great Demo! within organizations, we are sensitive to these existing definitions – and corresponding align with imbedded sales methodologies’ vocabulary and processes.]

### **Keep It Rolling – Excelsior!**

Great methodology implementation is never really “done” – it becomes an ongoing process. New hires and transfers between departments need to be exposed to the methodology, new learnings need to be incorporated, newly minted front-line managers require training on coaching (both how and what) – and it is likely that the methodology itself will evolve over time.

Onboarding is clearly a key portion of the “Keep It Rolling” process.

For many methodologies early exposure to the key ideas has a huge impact on adoption. Accordingly, many organizations include full methodology training sessions as part of their onboarding process or “boot-camps”. Other companies offer introductory courses, then “season” their new teams in the field for a period of time before bringing these teams back for more complete training.

The nature of the methodology, along with the organization’s offerings, customers, and market will likely determine which approach is best.

[GD! For Great Demo!, we’ve seen the most successful adoption and implementation for new hires following the second approach: the new hires are given a 1- or 2-hour introduction to Great Demo! during the initial onboarding process, then sent out to the field for several months, followed by a full 1.5-Day Workshop. The introduction “sensitizes” the new hires to the key ideas; the in-field experience gives them the deeper understanding of how their customers consume the offerings (or want to consume the offerings). This experience provides a sufficient foundation for the follow-on training.]

Next, let’s discuss Tribal Knowledge... Tribal Knowledge is a wonderful and terrible thing. It is wonderful when it is collected, shared and used; it is a terrible waste when this doesn’t take place.

Front-line managers typically see and hear the good, the bad, the great, and the awful things that are happening in the field. Rarely, however, are there effective mechanisms in place to collect and share front-line learnings.

Methodologies change over time as the authors of the methodologies uncover new ideas and discard concepts or skills that are no longer relevant. Methodologies also change as they are practiced by individual organizations, as they enter and exit markets, release new offerings, and as their customers change. Great methodology adoption and execution includes incorporating new learnings (and discarding old as appropriate).

This suggests that there needs to be a person or team that takes the responsibility to continuously evaluate and evolve a methodology, as it is consumed and practiced by any particular organization. In large(r) companies, this may be the responsibility of an enablement group. In others, it may fall upon the shoulders of front-line managers. In any case, successful ongoing execution suggests that there needs to be a group or team that takes the responsibility for managing this evolution.

Some organizations have also established “round-table” discussions on a regular cadence (e.g., quarterly) to surface and discuss issues, challenges and opportunities with respect to specific methodologies. Their output feeds back into the training courses and coaching practices (hey – that’s another virtuous cycle!).

**[GD! For Great Demo!, we started the Great Demo! Group on LinkedIn to serve as an ongoing, evergreen mechanism to share new ideas, surface best practices, and provide tips on new technologies. It is, in essence, a Great Demo! Users’ Group.]**

Another important component for ongoing implementation and evolution is the use of software systems to enable, support and extend the methodology. CRM systems, for example, will typically need to be customized to support the specifics of a sales methodology – both in terms of process steps (and vocabulary) and reporting.

The ability to deliver reports on the desired KPI’s and metrics drives the balance of the customization (or configuration) approach, in fact, since the ability to generate specific reports determines what information needs to be captured (and how and when).

Shared areas may need to be established for access to supporting materials as well. Many sales methodologies require materials from marketing to enable sales to use the methodology (e.g., CustomerCentric Selling requires references for cold calling; Challenger requires “Commercial Insights”; Miller-Heiman practitioners work from Blue Sheets, etc.). Organizations need to consider what standards need to be in place to submit materials, who can submit, QC, access – and clean up the shared areas from time to time. (Interestingly, most shared areas are *never* cleaned of outdated or irrelevant materials...)

**[GD! For Great Demo!, consider the following:**

- Include Situation Slide, Illustration, and Menu fields in the your CRM and/or shared areas.
- Make reasonably complete Situation Slides a prerequisite for allocating presales resources to sales for demos other than Vision Generation.
- Capture and share successful Situation Slides, Illustrations and Menus for use by the field.
- Capture and share Informal Success Stories from successful customer implementations for use by everyone – these are of particular use for new hires.
- Use tools like Refract.ai and Gong.io to capture and share examples of what “good” and “Great” looks like for presenting Vision Generation demos and Technical Proof demos.]

## A Methodology for Methodology Success

For the two of you who have read this far (many thanks), here is a summary of the key ideas to achieve successful adoption and the rewards of a methodology:

Prior to the first training sessions:

0. Be clear on your overall objectives – what specifically are you looking to accomplish?
1. Make sure you understand what *doesn't* work.
2. Discuss and agree on key success factors and the metrics you will track and assess, both for Adoption and for ongoing Execution.
3. Establish a baseline.
4. Train front-line managers and mentors on how to coach their teams (in general).
5. Introduce the front-line managers and mentors to the methodology and coaching elements.
6. Ensure that front-line managers and mentors take the training with their teams.
7. Address and enroll other impacted and impacting teams, as appropriate

Immediately after the first training sessions:

8. Re-establish a baseline (and discuss and resolve any differences in the baseline results before and after the initial rounds of training).
9. Tune the training and course material as appropriate.
10. Assess the trainees in terms of the Three Groups.
11. Push/Pull, Poll and Publish to establish virtuous feedback cycles – focusing initially on Group 1 trainees.
12. Address and enroll the balance of the other impacted and impacting teams.

And on an ongoing basis:

13. Keep It Rolling – implement as appropriate in your internal systems and your onboarding process for new hires and transfers.
14. Periodically gather front-line managers and mentors to identify issues and opportunities, and post examples of what “Great” looks and sounds like.
15. Continue to Push/Pull, Poll and Publish to keep the virtuous cycles thriving.
16. Track the KPI's and metrics, assess, refine and execute!

You'll know you've truly succeeded when you overhear a “seasoned veteran” at your company tell a new hire, “This is the way we do this here...” referencing some key vocabulary and process steps of the methodology. It has become embedded as part of the company culture!

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