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The Top Twelve Tips for White Boarding

Become A Wizard of the White Board!!

Using the white board to make a presentation, or even a single point, in a sales meeting is rapidly becoming a lost art. A simple Google search will give you millions of hits for PowerPoint best practices, and a mere handful for white boards or free-style drawing. Most of those links will relate to using the white board in an educational or university style setting, yet the use of a white board helps personalize any sales presentation and promotes interactivity in your meetings.

So even if you have the artistic ability of a three-year-old and the handwriting of a doctor, read on to learn how to make *The Perfect Pitch* using a white board, and become the Wizard of the White Board.

Plan Ahead

Sir Winston Churchill once said "*I'm just preparing my impromptu remarks*". For those situations when you know there is a high probability you may need to use a whiteboard, think about it and plan ahead.

1. **Practice makes perfect.** Practice your impromptu drawing several times beforehand. Either use a whiteboard or just a plain sheet of paper to make sure you have enough space. I usually mentally divide the board into straight thirds or quadrants for placement purposes and reserve a small section for an issues "parking lot".
2. **Watch what you wear.** Don't wear white if you plan to be up at the board for more than a few minutes. You will blend into the background and depending upon your skin tone, will either look like a mime or a shadow puppet.

3. **Check the lights.** Ensure there is no glare on the board from outside windows, sunlight or overhead spotlights. Know how to turn off or dim the lights and drop down window shades. Sit in several seats at opposite ends of the room to check out visibility and line of sight as well.
4. **Use strong colors.** The optimal colors are black, blue and the ever-friendly green. Avoid orange and yellow as they tend to wash out. Brown is just boring, so should be utilized for something that is conservative, safe and functional. Reserve red for a really important point, or for highlighting a danger or even a competitor's shortcoming. The codicil to this tip is beware if someone hands you a red marker during a presentation!

Using The Whiteboard

Now that you are well prepared for using the whiteboard, the time has come to put all that preparation into practice, so what do you do next?

1. **Getting started.** I never start at the whiteboard, but take a seat at the table for introductions, agenda and timeline confirmation etc. Use your initial motion of moving to the whiteboard as an attention-getter. It is also a way to gain control and re-focus a meeting that may be slipping away from you. You can be directive, as in *"..here, I'll show you how .."* or collaborative, as in *".. let's work on that together."*
2. **Picasso at work.** Remember that you are not being paid your amazing salary because you are a world-class artist. Just make sure that your diagrams and verbiage are clear and legible. Don't make the mistake of writing as fast as you can because your back is to the audience, or of contorting your body sidewise to write and maintain eye contact at the same time. It is far better for your board to be legible and neat. Use either print or cursive writing - whichever is easier to read, and aim for lettering about 2-3" (5-8cm) high.
3. **The first few minutes.** Make your first minutes compelling, so use some form of energizer, or make an immediate point on the whiteboard. Try writing down some numbers (with no labels) or drawing a big red "X" through some alleged fact, statement or topic.

4. **Engage the audience.** Apply all of the other "Perfect Pitch" principles to your whiteboard presentation. Make sure the audience can hear you, maintain strong eye contact when you are not writing on the board, stand up straight and beware of excessive gestures if you have a marker in your hand. Just because you don't have a laptop with PowerPoint in front of you as a crutch doesn't mean you throw all your good habits out of the (shaded) window.
5. **Promote interactivity.** Active participation usually leads to support of your ideas. Hand a marker (of a different color) to your customer and allow them to add/modify your presentation. Try *"here.. show me/us what you mean.."* or *"..it always helps when people draw things out for me."*

In Closing ...

Don't overstay your welcome at the whiteboard, unless you are creating some new and revolutionary content, so aim for 15-20 minutes maximum. Be prepared to wrap up, summarize, hand control over to a colleague and sit back down.

1. **And my point was...** When you journey up to the whiteboard, you should have a goal in mind. Once you have achieved that goal, to the satisfaction of the audience, summarize and then shut up and sit back down. Should your goal have more than two major points, you may want to revisit exactly how you are going to get the message across without confusing everyone.
2. **Capture the moment.** Ideally, one of your colleagues in the room should be keeping notes and copying down everything on the board, especially if there was customer participation or you truly made an impromptu presentation. Unless the board has a built-in copy function, take out your mobile phone and take several photos of the board for posterity.
3. **Include the rest of the family.** Treat the whiteboard as a genre - by extension, you should be equally comfortable using its cousins the flipchart, blackboard and cocktail napkin. Should your company utilize webcast technology, learn how to use the freestyle drawing capabilities inherent in that software, as using a mouse to draw is not the simplest thing in the world for anyone over the age of twenty-one.

Summary

Before your next PowerPoint presentation or product demonstration, take a serious look at your content and decide if there is a portion of it you can "carve out" for whiteboard presentation if the opportunity arises. You can also prepare answers to common questions in those cases where a picture is worth a thousand words. The final tip, unlucky thirteen for some, is DO NOT use the whiteboard if some people are attending the meeting via speakerphone.

"A year from now you may wish you had started today"

Karen Lamb, Author/Journalist

Talking Points is a monthly column authored by John Care, Managing Director of Mastering Technical Sales. For more information on this and other Sales Engineering topics visit the website at www.masteringtechnicalsales.com.

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