The ROI Of White Boarding

"Now I See What You Mean!"

As part of the research for the long-awaited[i] Trusted Advisor Sales Engineer eBook I've been having many interviews and conversations with sales and sales engineering leaders around the world. An astounding **74%** of them listed "*more meaningful customer conversations*" or "*stop presenting and start listening and communicating more effectively*" as one of their top 3 professional skills initiatives for the next 24 months. Back in 2012 the Aberdeen Group[ii] cited a number of 53% - so the situation is only getting worse.

Part of the solution to this apparent skill gap is reducing the reliance on PowerPoint and increasing the fluency of the technical sales team to visually explain and diagram things. Closing the laptop, and drawing with a set of marker pens, pencil or even on a tablet, opens the channels of communications and promotes far more interactivity. One of our clients reported a **31% increase in quota achievement** for sales teams using visual selling techniques (you can read that ROI summary here)

We've now had the opportunity to train over 10,000 SE's and sales people. When we survey some of the participants and collate the data it shows that – when applied to direct sales, sales engineering and product marketing teams – white boarding, and visual selling in general, is a lost art.

Survey respondents noted their use of the following tools in sales situations:

Communications Mechanism	% Primary Use
PowerPoint	38
Product Demonstrations	25
Phone	16
In Person Conversations	13
White Boarding	**10**

(Rounding cause numbers to > 100% in total)
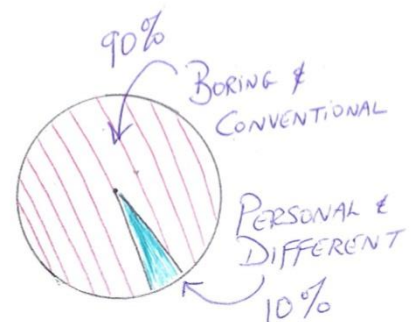
So not only does a mere 1 respondent in 10 actually use visual selling as part of their standard pitch, but of those who do use this technique, the majority report that they create their sales aids in an ad-hoc fashion with no corporate help or input whatsoever. This results in an inconsistent message being conveyed to the customer base.

Specific ROI Case #1

A large enterprise technology company, in the face of some brutal competition, decided to adopt a more consultative sales approach. Nothing particularly amazing about that, and companies adopt that strategy all the time. What was different was that a new Regional Sales VP decided that instead of employing yet another sales process that most of the team would ignore – she was going to work on "life and communication skills" instead. Specifically that meant less reliance on prepared materials, collateral and electronic presentations, and more reliance on good old fashioned conversation and face to face meetings.

As part of this process we were asked to devise a visual communications training program which would jointly embrace the quota carrying sales people, a set of product sales specialists, the general SE community and talented group of Subject Matter Experts. This turned out to be a set of two day workshops with some follow-up video feedback and training. Probably the most novel part of the session was that for two hours we actually ran a role-play in a coffee shop on premises to practice (literally) back of the napkin facilitated conversations. If that all sounds a little left-coast, "touch-feely" … we ran this in Europe, not Silicon Valley, and look at the results.

Metric	18 Month Change
Overall Length of Sales Cycle	Reduction of 6 days for SMB Accounts Reduction of 9 days for Major Accounts
Lead Conversion Rate (Initial call to eventual Proof Of Concept or Trial)	Increase of 22%
Number of "1-Head / 2-Legs" calls. (i.e rep was confident enough to make a solo call without an accompanying SE)	Increase of 33%
Executive Access (measured as delay between requesting an exec meeting and actually getting it)	Decrease of 2.5 days
Actual Regional Revenue Generation	121% Attainment (vs 79%)
Incremental Regional Revenue Generation (vs other regions)	25%
Percent of Salespeople who attained quota	78% (vs 41%)

The revenue numbers naturally made everyone feel very proud of the program – yet the number the SE team liked the most was the increase in "1-Head / 2-Legs" calls. That meant that both the salesperson and the account SE were free to focus on different parts of the organization and interweave their strategies. The rep was confident to go solo on many calls, and trusted the SE to do the same. That efficiency and competency, together with the improved communications skills made all the difference.

Specific ROI Case #2

A small-medium sized IT utility software company was looking for a way to differentiate their technology and their solution in the marketplace against much larger competitors. They decided to minimize the use of PowerPoint wherever possible and instead focused on a visual method to present their:

a) Technical Architecture (& Competitive Differentiators)
b) Customer Success Stories
c) Business Value "Pain Chains"

Mastering Technical Sales facilitated a meeting between presales and product marketing to generate a series of standard whiteboards, which the 35-person global presales team could then use as a basis for customization. This was followed by two 2-day regional training and rollout classes and some follow-up personal coaching. They noted the following results over a 12-month period.

Metric	Score or Increase
Sales Satisfaction w/Presales (1-5)	Increased from 2.9 to 4.1
Evaluation Conversion Rate	Increased from 68% to 81%
First -> Second Call Success Rate (initial call leads to follow-on call)	Increased from 35% to 52%
Presales NPS - Customer Techies	Increased from 32 to 51
Customer Management	Increased from 22 to 28
Partners	Increased from 27 to 43
Overall Revenue / Head (converted to US$, and compared to quota increase)	Increased from $1.72m to $2.6m (53% growth vs 30% quota raise)

Statistically, most other variables remained constant in terms of sales force productivity, product capabilities, competitive landscape and SE retention. Whilst not all of the gains can be directly attributed to enabling the SE team with whiteboard skills – most can.

> "Three weeks after the MTS class we ran a technical workshop for our #1 customer in Europe. We used PPT for reference only and drew almost everything. What a difference! Months of confusion disappeared and we finished the day with nearly €1m of leads''

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[i] Planned for release as an eBook December 2015
[ii] I'm not allowed to cite their numbers, but you can sign up for a free Aberdeen account and read: Aberdeen Research Group. Best Practices In Maximizing Sales Productivity – Peter Ostrow: (customer report) http://www.aberdeen.com/Aberdeen-Library/7924/RA-sales-training-coaching.aspx