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## White Board Session #2: Remote Presentations

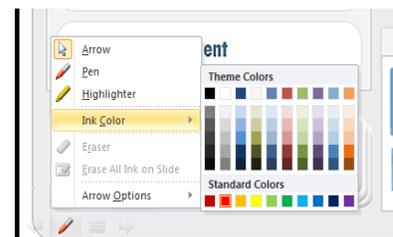
### Sketching Your Architecture

It is 2020. We are almost all remote and on Zoom, Meet, Teams etc. for multiple hours every day. Yet I am amazed by the lack of visual (as opposed to verbal) interaction during these sessions. When teaching my White Boarding For Sales Engineers class I consistently need to remind students that you can (and should!) whiteboard within a webcast<sup>1</sup>.

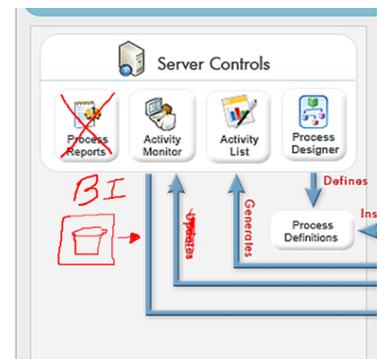
One specific example is when explaining, designing, or confirming a proposed architecture with your customer. This usually involves a slide deck, exchanging diagrams and a mass of words.

If you have ever finished up a call with an action item of “*revise the diagram based on our discussion*” then you’ve missed an opportunity to engage in visual selling and accelerate the sale. There are a few ways to visually diagram when selling remotely:

1. **The Mouse** Whether using a slide deck or the built-in White Board of your remote tool (i.e zoom, Webex, GoToMeeting) a mouse gives you rudimentary annotation abilities. Select your graphics tool and then apply simple lines and highlights to your architecture sketch. Although I have yet to see anyone over the age of 12 use a mouse for anything vaguely artistic.



2. **The iPad**. There are many drawing programs you can purchase for a tablet – using a high-quality stylus as input. I’ve been using AirSketch, Jamboard and Microsoft Whiteboard on an iPad Air in most of my workshops. It allows me to draw on the iPad and then display the screen to the customer. You can also wirelessly project to a browser window on a PC/Mac that is then presented via the webcast. The resolution is OK for most drawings and sketches – and tablets keep getting better. Just import a slide, either directly or as a JPG and make it the background of your WB and then draw on top of that.



3. **The Laptop.** Most of the current generation of laptop – tablet – “do everything” devices now allow you to draw with a stylus or even your finger. Both classic Windows and Mac machines feature excellent built-in drawing functions that are simple to use. With a little creativity you can also superimpose your sketches on top of a PowerPoint slide during a webcast.



In most environments I connect to the virtual delivery tool twice – once on my laptop, as the main driver platform and UI, and then secondly on an iPad. For example – in Zoom it gives you a user-view of what is being displayed (so you can check latency and resolution) , plus you can also draw directly on top of a slide from an iPad.

So here is the takeaway – instead of verbally confirming architecture with a customer, visually confirm it as well. You will prevent misunderstandings and potentially another unnecessary follow-up meeting (or at least shorten it!).



**BONUS TIP:** Many of my customers now intentionally place a blank black or white slide in their PowerPoint deck for an “impromptu” whiteboard. It is very effective.

I do this for a living. There is a complete best practice for planning and framing the content of a visual sales pitch. (I don’t actually possess a “corporate/about-us” slide deck) Should you need advice and training to create, deliver and train your teams on a memorable, but simple cloud whiteboard – [contact me](#).

**"A drawing is simply a line going for a walk"**

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](http://www.masteringtechnicalsales.com).

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<sup>i</sup> Our data shows that sales teams who utilize visual selling as a tactical tool during their sales process have a 31% better attainment than those who just use slides and demos!