Empowering Sales through Visuals

Whiteboard Selling

Corey Sommers • David Jenkins
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Foreword

Of all of our inventions for mass communication, pictures still speak the most universally understood language.

—Walt Disney

Knowledge is power. Prior to the early 1990s, salespeople had it—buyers didn’t. Today the tables have turned and buyers can now get information about your products and services whenever they need it, thanks to the Internet.

Allow me to expand on this. A commonly held belief among many executive leadership teams is that the keys to a good sales force are: (1) to make sure they have deep product knowledge and (2) that they can deliver a compelling pitch about their products and services. Operating on those beliefs, sales organizations developed deeply ingrained cultures where product training was mandated, centrally prepared and tightly controlled sales decks were developed, and specific step-by-step sales processes were implemented. There was a great deal of focus on the delivery of the sales pitch, and a bevy of feature- and function-rich materials provided as leave-behinds. These methods were effective during most of the twentieth century because salespeople were the most common source of information for buyers. It just made sense to create
a business process at the heart of which was control of the information flow to buyers through sellers.

Unfortunately, the preferences of buyers (particularly executive ones) have changed. Due in large part to the Internet, the pendulum has shifted and buyers are often more informed about the products and services than the salespeople. Salespeople who don’t add value only add cost to the value exchange. In order to squeeze out costs, professional procurement organizations are increasingly active in more buying negotiations. Since the tables have turned, and these buyers now have more information than their sales counterparts, they are winning. This development is the single biggest driver behind the margin erosion felt by most B2B businesses.

In response, many sales leaders are directing their teams to bypass procurement functions and sell higher in those organizations. The higher the level of executive targeted, the less interested they are in learning about products and services and the more interested they are in the role sellers play in helping them meet objectives or solve problems. Understandably, then, a new form of communication is required but few sales forces have figured out the right formula to elevate who they sell to or how to cross-sell their products. Forrester Research has been studying the perceptions executives have about sellers in our annual buyers insight study. Less than 20 percent of these executives find that the common salesperson adds value, and 68 percent believe salespeople are only wired to launch into some prepared pitch about their products or services. Clearly, something needs to change.

So, why is communicating with executives so different? For starters, the scope of their responsibilities is much broader than their subordinates’, so the issues they want to tackle are more holistic in nature. In order to get their arms around all of the moving parts, executives like to visualize the system in order to make sure they have visibility into all of the cause-and-effect relationships they need to address in order to
be successful. In addition, these people have risen through the ranks to become leaders in their organizations because they have proven they can produce results. Thus, they are much more inclined to discuss an example about how other customers have worked with your firm to solve problems or meet goals, and they really want to hear about common pitfalls and how other people like them have worked around them. The scope of these conversations and their dynamic nature are not a fit with a traditional product-centric, prepared pitch-driven communication style. It requires a fundamentally different approach.

This is why this book is so important. While the concept of using a whiteboard to communicate complex ideas is not a new one, creating an overall architecture and process for developing the content and equipping salespeople with the skills to create one is. What Corey Sommers and David Jenkins do in this book is to first establish the basic attributes of how a whiteboard discussion framework should be constructed to effectively empower sellers with a safety net to stay relevant to an executive audience, and then show the steps for how to convert prose-based messages into a visual format. Finally, Corey and David provide the common requirements and whiteboarding best practices to properly train salespeople to be effective in client situations. When successfully executed, this new medium of communication allows for much faster ramp-up times of salespeople to deliver a complex message, while at the same time reducing the noise inherent in traditional presentation approaches.

—Scott Santucci
Research Director and Principal Analyst
Sales Enablement at Forrester Research
Are you a sales professional looking for a new and creative way to engage your enterprise prospects?

Or a marketer determined that sales will use the right messages to attract economic buyers into your sales funnel with a unique and fresh approach?

Or a sales leader, focused on sales transformation, larger transactions, and shorter time-to-close?

If so, then this book is for you.

What if you could sell with nothing more than a pen and a drawing surface? When sales professionals lose the PowerPoint and use the pen, they are more confident, and they are much more likely to compel buyers to act. This book shows you how to make this transformation for yourself or your entire sales and marketing organizations.

We should make it clear up front that although this book is titled *Whiteboard Selling*, this by no means implies we are inventing whiteboarding for sales. Seasoned sales professionals and other customer-facing personnel have been whiteboarding for decades. All we have done is put a heavy dose of structure and process behind building powerful visual stories and discussion frameworks, and then enabling sellers to present them in a way that captivates and motivates buyers.
Is Selling with Visuals a New Idea?

Yes and no. There are literally thousands of books on the power of visual communications, visual thinking, and presentation skills—and not just books, but reams of academic papers, studies, and surveys. Indeed, it is well established that visual thinking, learning, and communication styles and approaches have clear advantages when conducting business. Ours is an increasingly visual culture; we consume media and information through an ever-growing variety of visual channels.

Likewise, there are many books and other publications that detail different sales methodologies and processes. Ask any experienced sales executive and they will recall at least two or three different packaged sales approaches they have been trained on, each with its own twist on convincing corporate buyers to part with their valuable budgets.

How many books have been written on how to build and deliver better PowerPoint presentations? Presenting a set of slides to a customer is not selling with visuals. Selling is a dynamic exercise. Selling should encourage interaction with, and participation from, the buyer. If the buyer is passively observing a set of slides, then you are not using true visual selling.
How This Book Is Different

So how is this book any different from those mentioned earlier?

It is entirely focused on the power of hands-on visual selling techniques to enable your sales force to sell bigger deals faster. And not just large sales forces—even a small business owner or a few salespeople working at a start-up can use these techniques. If you are going to learn to use visual thinking and communication when you sell, then you have to learn a unique viewpoint and a set of best practices, all of which are contained in this book.

The visual selling techniques and approaches in this book are appropriate to any sales methodology. Enabling sales through visuals can be part of any approach to selling and any sales enablement program. The use of powerful visuals at the point of sale—that moment of truth, so to speak, when a seller is communicating the unique value proposition of their product or service—is just one part (perhaps one of the most important parts) of any larger sales model or sales transformation initiative.

This book contains hands-on, step-by-step guidance on how to design powerful visuals to support your sales process. It is explicitly designed to be a complete and exhaustive companion to any sales and marketing organization’s efforts to bring visual selling techniques to its go-to-market strategies. This book is as heavy on practice as it is on theory.

The book is valuable to both sellers and marketers alike. It provides this practical guidance in a way that both sales professionals and marketers can use to become more effective. While the term “bridging the sales and marketing divide” is often overused, in this case it really fits. This book will help get marketing’s message out to sales in a usable and powerful fashion.

And finally, this book is based on proven best practices and results demonstrated over half a decade of rigorous application in professional
sales environments. More than 50,000 sales professionals in more than 20 countries and belonging to more than 75 sales organizations have benefited from these approaches to dramatically change the way they communicate with customers and prospects.

Is It the Whiteboard That Matters?

Some would argue that drawing on a whiteboard—“whiteboarding”—is not the point and it is really visual thinking and idea creation that matters. This is partly true. But in *Whiteboard Selling—Empowering Sales Through Visuals*, we specifically explore the use of the whiteboard (or any drawing surface for that matter) as a disciplined, repeatable, and process-driven mechanism that enables high-dollar sales of complex products and services targeted at educated buyers.
Using a pen to draw ideas is only useful if it drives a compelling event such as the purchase of a million-dollar software suite, medical device, financial service offering, or consulting service (among many other types of products and services). When you use a drawing surface to sell solutions, you have to understand the sales process and field training/enablement. You have to assess each individual salesperson’s proficiency using visual thinking to move a sales opportunity to the next level. Sketching stick figures, smiley faces, and other “cave art” won’t increase sales in a meaningful way without understanding the sales context in which they are drawn.

By the end of this book, you’ll learn how to train and enable your entire distribution channel with powerful tools and techniques to make the power of the pen a groundbreaking differentiator in how you bring your products and services to market.

How You Should Use This Book

Part 1—The End of the Age of Slides

We’ve been helping businesses, large, medium, and small, to ditch their slide projectors since 2007. As time goes by, we have to convince our customers and prospects less and less that whiteboard selling has clear advantages over slides for important sales interactions. In the first section of this book, you will learn why slides should play very little role in high-dollar sales interactions and sales training, as demonstrated by real-life stories from the field.

Part 2—The Visual Selling Opportunity

Once you understand that salespeople and sales trainers can actually completely free themselves from the evil clutches of slides and projectors, Part 2 will teach you about the specific opportunities
and benefits of leveraging visual selling techniques and the science behind why this is so effective. We’ll also highlight some results that may impress.

**Part 3—What Exactly Is a Whiteboard for Sales?**

In this section we showcase a number of different whiteboard types using a case study to demonstrate whiteboard structure, content, and flow. Part 3 also includes a variety of exercises and activities to flex your whiteboarding muscles.

**Part 4—Building a Whiteboard for Sales**

Whether you are an individual contributor or the head of a marketing or sales team, you’ll need to marshal some key resources—both people and content—before embarking on whiteboard design. Then, we’ll show you how to follow some basic and proven whiteboard creation best practices.

**Part 5—Enabling the Field**

You’ve designed some powerful whiteboard stories. So what’s next? This section covers sales enablement options, how to test-drive your whiteboard prior to field rollout, and then how to measure the success of your whiteboard-selling training initiatives.

**Part 6—You Have a Whiteboard, So How Do You Present It and What Do You Leave Behind?**

This section covers some basic whiteboard presentation best practices, and how to use the whiteboard as a powerful tool for documenting and communicating the next steps in the sales process.
PART 1

The End of the Age of Slides
CHAPTER 1

The Role of Presentation Slides in Today’s Sales Culture

*The best way to paralyze an opposition army is to ship it PowerPoint and thereby contaminate its decision making.*

—Robert Gaskins, co-creator of PowerPoint
The term “death by PowerPoint” is so prevalent that it is now firmly entrenched in corporate culture. In fact, as of this writing, if you Google this term and look at the Google Images search results, you will see 50,000 images (many of them great comic relief) related to the term. The phrase was actually first coined by Angela Garber in 2001.¹ It was a good article. But like thousands of other articles and books on how to continue to use PowerPoint while avoiding its pitfalls, Garber’s piece was just that—suggestions on how to put lipstick on a pig. We ask, “Why not just fry up some bacon?”

So we know that slides are the predominant way organizations communicate internally and between buyers and sellers. But there is now data that shows there are significant, quantifiable costs associated with their use. Right around the twentieth anniversary of PowerPoint, a study cited in the *Wall Street Journal* conservatively estimated $252 million in lost productivity per day due to bad slide presentations.² The calculation is based on Microsoft’s 2001 estimate of 30,000,000 slide presentations in existence. That’s in 2001, during PowerPoint’s infancy or, at best, its adolescence. How many hundreds of millions of presentations could be out there now? Today’s daily PowerPoint productivity drain could be measured in the tens of billions of dollars!

**How Did We Get Here?**

Something momentous happened in the mid-1980s. Yes, it was the advent of the personal business computer, which was first manufactured by IBM. But more important than that, slide presentation software

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The Role of Presentation Slides in Today’s Sales Culture

was invented. Word processing, spreadsheet, and slide presentation software promised businesses of the 1980s an immense increase in productivity. They have no doubt reshaped corporate communications. Whether they increase productivity and effectiveness of high-dollar salespeople in the twenty-first century is debatable.

From Foils to Slides

Before slide presentation software existed, the notion of using a foil to communicate a singular idea within a larger presentation was not new. During the two decades prior to the 1980s, we first had the overhead projector with transparencies and then the slide projector, both of which were ubiquitous in college classrooms, government agencies, and corporate meeting rooms. The “pop” of an overhead’s worn-out light bulb and the audible “thwack, thwack, thwack” of the stuck projector slide are to some people fond (and to others not so fond) sounds of a bygone era.

When electronic slides arrived—which are, strictly speaking, computer-generated images that include text, graphics, and charts in
one program—they were a powerful change in communication. Now the presenter could seamlessly move forward or backward between slides, insert multimedia elements, and integrate with other software programs. The widespread addiction to slideware quickly took hold.

**Have We Moved Forward or Backward?**

This era of electronic slides created a new communication superpower: PowerPoint. Microsoft PowerPoint quickly became the dominant player in the computer-generated slide market, displacing Harvard Graphics in the late 1980s and early 1990s. Harvard Graphics never gained much traction when the market shifted to Microsoft Windows from DOS, where it had owned almost 70 percent of the market. PowerPoint, with its form and flash, quickly became the software of choice for corporate use, education, and increasingly, in the home.

Since then, PowerPoint has been widely (or should we say “wildly”) adopted as *the* way to execute a sales presentation in the corporate