



*Make Every Communication Count™*

# Maximizing Your Positive Briefing Results

# Customer-Focused Observations Regarding the Executive Briefing Experience

Briefing Programs are the settings for some of the world's highest-stakes presentations. Depending on what your customer experiences during a briefing, millions in sales revenue can swing to you—or to your competitors—in just a few hours.

- Important customers can be won or lost.
- High expectations on both sides can be exceeded or disappointed.
- Long-term relationships can be strengthened or damaged.
- You can create a barrier to your competitors' entry... *or open the door for them.*

## Executive briefings are a uniquely powerful, *one-time* opportunity.

Effective briefings are a priceless opportunity to capture the minds, hearts, and imaginations of your customers and prospects.

- These customers have come solely to meet with you and to evaluate your company and your story against your competition (whom they probably also will visit).
- You have the undivided attention of your customers and prospects, and you have them on your own ground.
- Positive, lasting impressions and strong, long-term relationships can be built in this unique climate...or, based on the briefing experience, your company can be perceived as only second best.

From the first word spoken in a briefing experience to the last, the stakes are extraordinarily high for your organization.

Briefings are a uniquely powerful way for customers and prospects to experience your brand. Customers extrapolate from the behaviors they observe during a briefing (and throughout the sales cycle) to imagine what it would be like if they chose to do business with you.

Every element of your briefing must be orchestrated to reflect the level of professionalism, customer focus, quality, responsiveness, integrity, innovation, and teamwork that will translate into a display of significant value which the customer can expect to receive by doing business with you.

Never forget: A briefing is a strategic display that tells your customer, "What you see is what you will get!"

Some of your customer guests have likely been going to vendor briefings for decades. When they walk through glass doors that read "Executive Briefing Center," they have an expectation of the caliber of experience they will have.

While there is always a stated briefing objective related to product, solution, or strategy, there is sometimes a more subtle, possibly even subconscious, agenda. As Peter Drucker pointed out, *customers are rarely buying what you think you're selling.*

Indeed, when customers know that both you and your key competitors can meet their technology needs within an acceptable range (you're on the "short list"), they may use the briefing experience to *evaluate you as human beings.*

*When all else is equal, [vendor behaviors] can make the difference between winning and losing customers and critical contracts. When there is little difference between what you can offer customers and what your competitors can offer them, you can still behave differently toward your customers and gain (or lose) crucial advantage. In the landscape of differentiation, behavior is the final frontier.<sup>1</sup>*

Does this all make a difference? Documented findings from the Association of Briefing Program Managers (ABPM) Multi-Client Study<sup>2</sup> indicate that, as a result of briefings, customers **buy, buy more, and buy sooner.**

## Briefings may occur at any stage of the sales cycle.

Briefings offer an opportunity for "discovery" and for building value-added relationships with potential customers. Prospects may open up and discuss their business challenges in a briefing center in a way they would not do during a sales call.

Briefings delivered during "best and finals" can be the difference that moves the customer to choose you over your competitors. A clear, consistent, customer-centric story—delivered in a professional, trust-building manner—can strongly communicate your value as a potential vendor and partner.

<sup>1</sup> Terry R. Bacon and David G. Pugh, Ph.D., *Winning Behavior: What the Smartest, Most Successful Companies Do Differently*. AMACOM, Division of American Management Association, New York, 2003, p. 7.

<sup>2</sup> The ABPM annually surveys hundreds of customers who have attended briefings. The survey data have been published annually for 17 years, and the results are consistent.

For customers with whom you have long-term relationships, briefings can help strengthen those relationships by providing periodic technology updates, opportunities to share mutual strategic direction and visions, and a forum for gathering customer input or feedback.

The customer's opportunity to meet with your executives and subject-matter experts – in a setting that can provide broad, industry-level strategic perspectives, as well as tactical insights – can provide the customer with unique and memorable value and is a major investment opportunity in the relationship for both parties.

## Customization is critical.

Every aspect of the briefing experience must be personalized and customized for your customer/prospect.

Naturally, the customer's name and logo need to appear on agendas, slides, name tags, name tent cards, etc.

*Personalization* also means going as far as having the customer's products or services displayed (and in use, where appropriate) – and having none of their competitors' products visible.

Anything that positively exceeds a customer's expectations for personalization moves your cause forward.

Personalization is primarily tactical, but it is expected and required. It alone won't win the day, but the lack of it can help you lose.

Strategically, what moves the customer satisfaction needle is *customization*<sup>3</sup>.

A briefing that is specifically customized and tailored to the visiting prospect demonstrates your ability to listen to, partner with, and provide each customer with the best solution *for that specific customer*.

Customization means that the content of the messages (in presentations and in conversations) and of the materials delivered throughout the briefing is relevant, and *stays relevant*, to that specific customer's business, personal needs, and challenges.

You will also want to use examples from the customer's industry and speak to *their* specific applications.

If a presenter shows up with a canned, generic product or service pitch, your guests will likely feel that their specific business is not very special to you. You will be missing an important opportunity to impress and, instead, will be sending a very different message from the one you probably intend.

<sup>3</sup> This has been the most frequently cited ABPM Multi-Client Study recommendation for 17 consecutive years.

Without adequate customization that is meaningful to your listeners, your guests can leave the briefing with the feeling that “we were just another car on a train passing through.”

That’s not the impression you want to make, and it’s a disappointment for your visitors.

## Technical professionals too often miss the mark during their briefing presentations and leave huge openings for the competition.

Without guidance and specific briefing-presentation training, subject-matter experts may become so enamored with their technology that they almost forget entirely that the customer has interests too.

- They may present what they want to tell, not what the customer wants to know.
- They may not link their message to the customer’s environment or needs.
- They may assume the customer will understand their jargon.
- They may overload the room with data.
- They may not link their presentations to the presentations of others.
- They may rush in and rush out without establishing rapport or a personal connection with those attending.

And in so doing, they undermine their listeners’ confidence and trust in your company.

## Executives play a pivotal role in the success of Briefing Program presentations.

Prospects and customers want to hear from your executives, just as much as they want relevant technical information and application insights.

- During executive presentations, the listeners are making decisions about pivotal questions that have a great influence on their final decisions:
  - *Can I trust these people?*
  - *Do they really care about my needs or are they just using the words?*
  - *Does this fit with what my salesperson has been telling me?*
  - *If I have trouble, will these people really bail me out?*
  - *Are these good business people?*
  - *Have they got a vision that supports mine?*
  - *Do I want to be associated with these people?*
  - *Does this relationship have long-term staying power?*
- Executive presentations also set the model for the presentations to be given by others. Leaders “lead by example,” whether they want to or not. The tone and style of an overall briefing often rides on the skill displayed by the executive presenters.
- Even people inside your organization who do not actually see their executives present in a briefing will hear about how well each speaker did and how skillfully and enthusiastically the executive participated in the experience.

Active executive involvement in briefings is a highly visible demonstration of interest in the customer during a powerful revenue-generating situation, and it will not go unnoticed.

## A briefing is no time to be “winging it.”

With so much to gain *or to lose*, briefings need to be carefully orchestrated beforehand and skillfully executed. If yours isn’t and your competitor’s is, the results can be predictably costly for you.

- Executives and technical professionals need to be trained so they can make the most of their critical “moments of truth” in front of customers and prospects.
- Many people feel they are good presenters, and some actually are. More than a few, however, are actually fairly poor presenters. Even the very best, in fact, have improved dramatically with professional training.
- With solid, skills-building training, fair to average presenters can become “good” to “great.” “Poor” presenters can become “highly acceptable” to “very good,” with a few even becoming truly “outstanding” at this work. Presenting well is a set of skills that can be learned.

- Executive presenters and subject-matter experts need to be trained so they can contribute to the way the whole experience links together and can fulfill their unifying role in it. A Briefing Program presentation is one act of a many-act play, not a solo.
- Participating in presentation skills training also enables executives and technical presenters to *credibly* coach others and sponsor training for others.
- “I’ve done it myself” modeling by executives is a particularly powerful way to encourage others who need presentation skills training, but who may be reluctant to acknowledge that need.
- Group interaction and facilitation skills also are becoming as important as presentation skills for making company briefings truly customized, constructive, credible, and positively memorable.

## It is a carefully planned process and an artfully designed experience.

Delivering a steady stream of excellent briefings requires a repeatable, disciplined approach to planning, as well as a set of tools that can help subject-matter experts and executives ensure they deliver customized, consistent messages to each customer.

- The process has a definable approach and measurable procedures that address the customer’s business issues, organizational and personal needs, challenges, and opportunities, not just the product/service/solution requirements.
- Salespeople must meet specific requirements in order to schedule a briefing, must provide adequate documentation and information on client needs and situation to presenters and briefing managers well in advance, and must have – and communicate – specific, mutually agreed-upon objectives and outcomes for each briefing.
- All presenters need to be briefed in person and/or by a common data template (or both) that will enable them to structure and tailor their presentations to the customer’s specific needs and expectations.
- A speaker preparation call should be conducted with the entire briefing presenter team, individually or together, one to two weeks before the briefing.

The purpose of this call is for the account team to provide the speakers and facilitators with key background and data on opportunity areas and hot buttons to address, topics to avoid, major decision influencers, and other important information unique to

this briefing. Such information is vital to help prepare the executive presenters and technical subject-matter experts so they can intelligently and confidently customize their content.

- Presentations need to be linked together to provide a unified experience and generate a consistent impression among the listeners.
- Presenters and subject-matter experts need to be trained in the skills needed to deliver clear, concise, credible, and persuasive presentations and to build personal rapport and trust through their personal presence and interactions in the room.

Some outstanding briefings have the engaging and compelling appeal of a well-cast, well-rehearsed, award-winning event. Others have the powerful, yet comforting feel of time well spent with a trusted old friend and mentor. A few extraordinary briefings display the qualities of both.

Such positive experiences for such important guests are meticulously created. They do not just happen.

Other briefings, unfortunately, feel more like a last-possible-minute rush to the station to catch the last commuter train of the night.

It is best to be certain that such not-quite-good-enough experiences are produced only by your competition.

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# About Mandel Communications

When the stakes are high, the quality of what you say and how you say it can make all the difference.

Every day, worldwide, organizations are turning their people's communication skills into a strong competitive advantage through Mandel's training, skills-building practice, and expert feedback.

Call on Mandel Communications whenever your organization needs to:

## 1. Build the Skills to Improve High-Stakes Presentation Results

- Sales Presentations
- Customer Briefings
- Presenting Ideas at the Executive Level
- Technical Presentations
- Executive and Manager Communications

## 2. Build the Skills to Sell Effectively at Executive Levels

## 3. Develop Trusted Advisor Relationships

Working with Mandel, you will gain a unique combination of demonstrable benefits:

- **Rapid skill improvements that can make the winning difference.** Mandel-trained professionals, managers, and executives can quickly create content and messaging that are listener-centric, clear, and compelling. Equally important, your communicators' personal "presence" will become increasingly "real," reassuringly confident, credible, and interactive.
- **Job performance improvements whenever masterful spoken communication skills are a key requirement for business success.** We will precisely tailor all that we do for you to achieve your organization's unique business goals, and our skills-building processes and tools will concentrate directly on producing your desired on-the-job results.
- **Global skill-building scalability.** To align with our client organizations' global activities, Mandel has expert trainers and coaches located throughout Europe, AsiaPac, India, and North America, and we build new communication skills in fourteen (14) different languages.
- **Face-to-face and virtual delivery options.** Clients consistently evaluate Mandel's face-to-face group training workshops and coaching services as world class in all aspects. Equally impressive are our capabilities to use digital delivery media - such as virtual meetings, virtual collaboration platforms, and TELEPRESENCE - to create outstanding skill-building results for you when face-to-face work is not the best option.

Please contact us whenever a significant improvement in spoken communication results could benefit your business performance. It would be our privilege to discuss these benefits with you.