

# ULTIMATE GUIDE TO SALES ENABLEMENT CONTENT

A close-up photograph of a hand moving a white chess king piece on a chessboard. The background is blurred, showing other chess pieces and a person's face. The image has a blue and orange color scheme with abstract shapes.

**Zo**mifier



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# 9 ENGAGEMENT OBJECTS THAT FUEL B2B SALES ENABLEMENT

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“Sales Collateral” immediately brings to mind brochures, sell sheets, data sheets, case studies, white papers, and similar other printed or digital content. Businesses spend significant effort and money to produce and distribute them in the hope of supporting their sales process.

Unfortunately, traditional sales collateral is no longer effective. Changes in customer behavior have drastically affected how and even if your content is consumed.

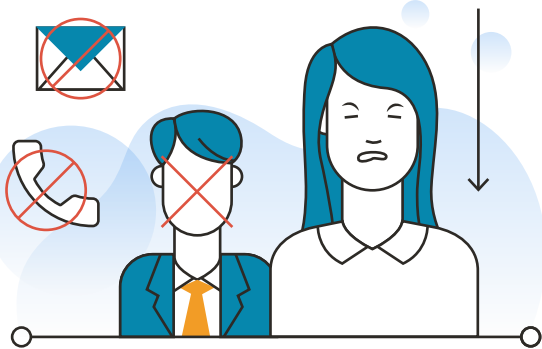
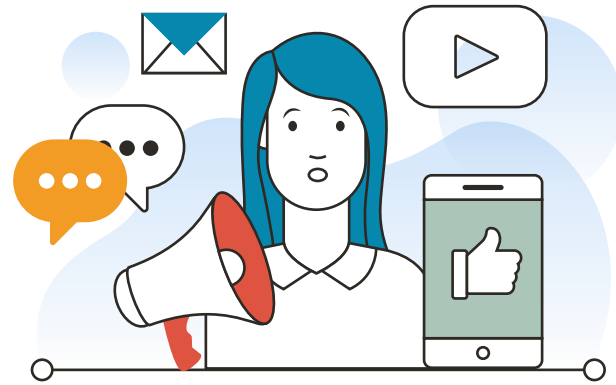
It is time to rethink the relevance of sales collateral in your B2B sales process.

# 9 ENGAGEMENT OBJECTS THAT FUEL B2B SALES ENABLEMENT

## What Changed?

Over the past decade, our behavior as prospects and customers has changed drastically:

The non-stop stimulations on social media and the internet, as well as continuous interruptions from mobile devices, have significantly reduced our attention span and affected how we consume information. It is very difficult to attract attention and retain engagement with traditional text-heavy sales collateral.



The constant bombardment of sales solicitations via ads, emails and phone calls has saturated our attention. We have learned to raise effective barriers to preserve our sanity. This has made it difficult for sales teams to get in front of their customers, engage them in conversation, handle their objections and infer their intent from their body language. Lack of in-person access prolongs the sales cycle.

We have all been empowered to self-discover solutions to our problems. We have all turned into “do-it-yourself” (DIY) buyers. We care very little about vendor’s features and benefits. We are more focused on how does it solve our problems. Most sales collateral fails to satisfy our preference for undertaking our own customer journey.



Given these changes in consumer behavior, continuing with traditional practices in sales collateral development will inevitably waste precious resources and severely hurt your business’s sales performance.

Here is a practical guide to overcoming these limitations, rethinking sales engagement and delivering content that will fuel sales enablement.

# 9 ENGAGEMENT OBJECTS THAT FUEL B2B SALES ENABLEMENT

## New Norms for Customer Engagement

The four rules listed below will help you deliver content that overcomes these new challenges of customer engagement:

**1. Keep It Bite-sized** - As far as possible, keep each piece of sales content brief. There are a few exceptions that we will discuss later but in general, if a piece of content can be consumed in 30 to 90 seconds then the audience is likely to view it right away and share it with others.

**3. Enable Personalization** - Remember sales enablement content is not marketing content consumed by anonymous website visitors or ad clickers. You already know who you are talking to. Make sure the content focuses on their context and their problems. Design and organize your content so that it is easily personalizable by your sales team. (We will show you how to do that.)

**2. Focus on Wow!** - It is sad but true that most audiences hate reading. Focus on communicating your message with crisp infographics, illustrative photos, clear animations and short videos.

**4. Engage on Mobile** -

**80%** of your audience views your content on mobile devices.

Make sure that it is easy to view, binge on and then share all via mobile devices.

Most of the existing sales collateral was designed with the assumption that the sales person was primarily responsible for engaging the customer. The primary purpose of sales collateral was to inform the customer on your offering and overcome their objections. With today's changed customer behavior, however, this is no longer a valid assumption.

Your sales collateral has to evolve into Engagement Objects that will engage the buyer when and where they want and empowers them to embark on a personalized customer journey. These Engagement Objects are designed to progress the customer through the decision-making process. They are easily personalized by a salesperson. They motivate the recipient to immediately view them as well as share them with other stakeholders. They will shorten your sales cycle and dramatically improve the salesperson's effectiveness.

The next section lists and describes the essential engagement objects that will fuel your sales enablement.

# 9 ENGAGEMENT OBJECTS THAT FUEL B2B SALES ENABLEMENT

The engagement objects listed below will align your offering with your customer’s business problem, assist them in building a business case and in procuring budgets, instill confidence in your offering and help them build an internal consensus.

**Teasers** - The first piece of communication to determine if a specific problem has been experienced by the recipient and whether they would be interested in further investigating the problem and possibly explore solutions to that problem.



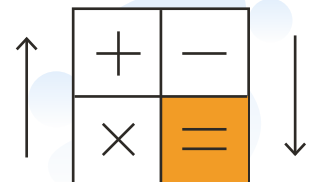
**Explainers** - An essential content piece that will help the salesperson leverage initial conversation to align the prospect’s problem-solving strategy with your offering and uniquely position you with respect to your competitors.



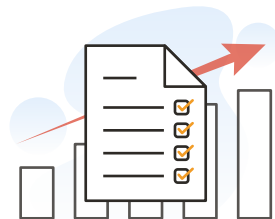
**Guided Tours** - Enables your salespeople to engage the prospect without the delay or costs of scheduling a pre-sales resource and developing a customized product demonstration to deliver inspired moments of “ah-ha” when prospects envision how using your product solves an important problem.



**Loss Calculator** - Draws a crisp and vivid contrast between an attractive Future (achieved with the removal of the problem) and a negative, unwanted Present (resulting from the existence of the problem) to induce a needed shock to the customer, quantifying its current cost of doing business as usual.



**Buyer’s Guide** - Navigates the prospect through the buying process by providing them guidance that positions your company’s offering as the “best overall” solution, builds a business case to procure budgets and mitigates the risks inherent in undertaking change.



# 9 ENGAGEMENT OBJECTS THAT FUEL B2B SALES ENABLEMENT

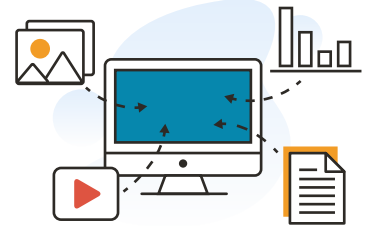
**Case Studies** - Describes the journey that one of your customers took in solving a problem with your offering and establish that other companies have solved similar problems using your solution. That makes your solution seem less risky and its benefits more believable.



**Interview Podcast** - An unusual but very effective sales tool. A series of immersive, lean-back audio recordings of customer interviews to learn about how other successful customers selected and implemented your product to inspire your new prospects.



**Rich Media Slide Library** - A game changing practice that enables a sales person to easily and quickly assemble an engaging and personalized presentation that is perceived by the audience as highly relevant to their needs and retains their attention during the entire pitch.



**Proposal Template** - Traditional sales proposals are the root cause of many lost deals. This new practice guides a sales team to summarize the buying journey and deliver a comprehensive proposal that retains relevance, positions you as a trusted partner and accelerates decision making.



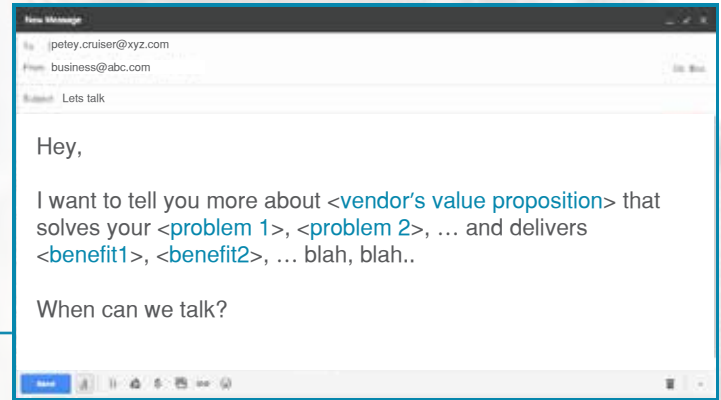
The Engagement Objects are listed roughly in the order in which they will be exposed to a prospect during the sales cycle. Depending on the complexity of your offering, different decision-maker roles, industry focus and applications of your solutions, you may have one or more of each Engagement Object types.

For example, if you are a startup with a new product, it is fine to start with a single Teaser and Explainer, a couple of Guided Tours, up to a 10-slide Presentation and one Proposal template. As your business grows, add additional engagement objects to improve your sales performance.



# TEASERS

***Everyday, each of us receives a sales email or phone call that goes like this:*** \_\_\_\_\_



So what's wrong with this? Well, almost everything!

First of all, it is not clear why this vendor's value proposition is important enough for you to be interrupted in the middle of your day.

Second, it assumes that you have all of these problems.

Most importantly, it assumes that your problems are the same as everyone else's and that you will accrue all the benefits they promise.

The overall tone implies that the salesperson is the all-knowing expert and you have no role to play in describing your problems or designing the solution that is most suitable to your unique business situation.

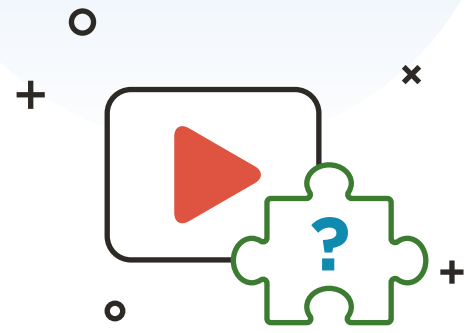
No wonder you immediately delete such voicemails and emails (or mark them as spam).

First impressions are important.

That salesperson lost an opportunity to differentiate themselves and establish their relevance. What was intended as a conversation starter died on arrival.

This is why the right conversation starters, or Teasers, are one of the most important pieces of sales enablement content in your toolkit.

Getting them right will greatly increase your sales team's confidence when they reach out to new prospects.



## What is a Teaser?

A Teaser is the first piece of communication that a salesperson uses to initiate a conversation with the prospect.

It is an inquiry to determine if a specific problem has been experienced by the recipient and whether they would be interested in further investigating the problem and possibly explore solutions to that problem.

## IT IS THE FIRST STEP

in the journey to establish your relevance and value as a trusted partner to the prospect.

It is an inquiry to determine if a specific problem has been experienced by the recipient and whether they would be interested in further investigating the problem and possibly explore solutions to that problem.

It is the first step in the journey to establish your relevance and value as a trusted partner to the prospect.

A Teaser consists of well-researched material that is succinctly articulated using infographics or videos.

It also includes communications pieces that establish context and a personalizable wrapper that makes the whole piece relevant to the intended audience.

The recipient should be able to consume the content in the Teaser in about 2 minutes. The recipient must have either experienced the problem or know of a colleague who has.

It should convince the recipient that it will be worth following up and discussing further. We will look at this in greater detail below.

Given that your sales cycle involves multiple stakeholders on the prospect's side and your offering provides solutions for multiple problems, it is very likely that you will need to equip your sales team with a collection of Teasers.

## When do you use a Teaser?

You use a Teaser when you are first approaching a new prospect, responding to an inquiry (for example, a marketing lead), or upselling or cross-selling to an existing customer.

In all of these scenarios, you would first have conducted your initial discovery of the prospect and built an assumption of what their problem might be.

Your goal is not to inform but to start a conversation and establish the relevance of your value.

Hold off on the temptation to bombard the prospect with your features and benefits just because they approached you in response to your marketing.

Even when a part of the customer organization is using your product and everyone is aware of your offering, do not assume that they know how your solution relates to their problems.

These are the false starts that a Teaser is intended to avoid and instead start the engagement with the prospect on the right path.



## Key components of a Teaser

A Teaser consists of up to 3 components. It should not take more than 2 minutes for the recipient to consume the message.

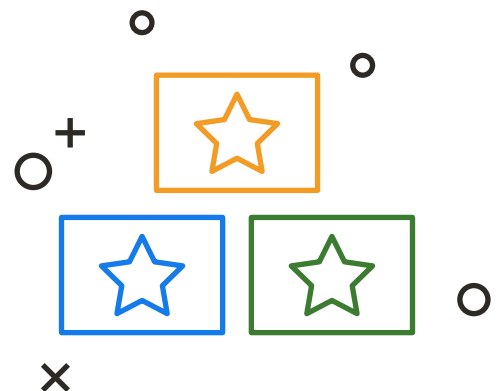
**An introductory email / phone script** It is a short and structured template that enables the salesperson to insert relevant context and inquire about a specific problem that the recipient may be experiencing.

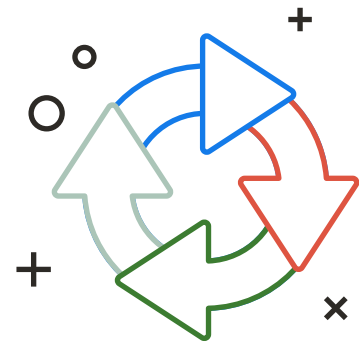
This is the minimum content required for a Teaser.

**A 30-90 second video or infographics** that clearly articulates a problem that the recipient may be experiencing as well as the potential adverse consequences of such a problem. This component can be either linked directly in an email or wrapped in a mini-deck (described below).

**A 2-3 slide deck template** that includes the 30-90 second video or infographics. The template enables the salesperson to insert relevant research pointing to the possible existence of the problem. It also suggests the next steps.

The links below provide sample templates and guidelines that will help you produce the Teasers for your sales teams.





## Teaser Best Practices

- 1. A Teaser focuses on establishing value and relevance.** It does NOT talk about your offerings or capabilities.
- 2. A Teaser is conversational in style.** It invites the recipient to partner with you on a journey to define the problem and explore the relevant solution.
- 3. A Teaser does not take more than 2 minutes to deliver its message.** This encourages the recipient to view it right away as well as share it with relevant colleagues.
- 4. A Teaser should include two next steps:**
  - A. Offer to contact your salesperson** to learn more and collaborate.
  - B. Enable the prospect to continue on their own with a deeper dive into the explanation of the problem,** its consequences and alternative solutions that will help them overcome the business problem (known as Explainers). It is perfectly okay if the recipient chooses this path. They have indirectly acknowledged that they are interested in solving this problem. It improves the salesperson's effectiveness and efficiency every time an Engagement Object continues to engage and nurture the prospect.

A Teaser is successful when the recipient sees your salesperson and your organization as a potential business partner, expresses willingness to embark on a journey to understand their problem, and identifies internal stakeholders who would influence the decision on the solution.

To learn more about other engagement objects, please see "9 Engagement Objects that fuel B2B Sales Enablement".



# EXPLAINERS

When a prospect describes their business problem, the salesperson usually jumps into “selling” their solution, describing the features that will overcome the problem and listing the benefits of their solution.

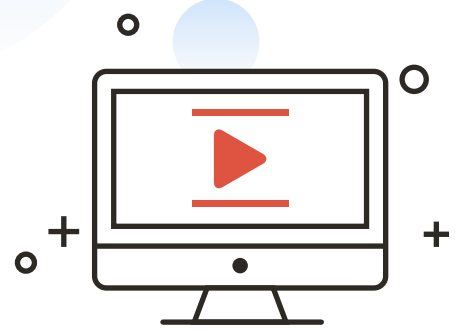
Seems normal, right? After all, isn't this what a salesperson is supposed to do? If the problem is very simple and straightforward then this may work. If the prospect has done deep exploration and research about their problem and has determined the ideal solution for the problem then this approach would work. In a typical B2B sales opportunity, however, none of these assumptions are true.

Consider the following questions:

1. Does the prospect know the root causes of the problems they are describing?
2. Does the prospect know about the consequences of not solving the problem?
3. Is solving this problem a high priority in their mind?
4. Do they know what is the best way to solve this problem?

If your sales team begins selling your solution before taking the prospect through this four-step journey then there is a huge risk that the prospect may find your offering as either irrelevant or undifferentiated from your competitors.

There is an essential content piece that will help the salesperson leverage this initial conversation to align the prospect's problem-solving strategy with your offering and uniquely position you with respect to your competitors. We call these content pieces Explainers.



## What is an explainer?

An explainer is a content piece that deeply engages a prospect to partner with you to solve their problem. In order to achieve this, an explainer should:

1. Explain why the prospect may be experiencing the problems they have indicated. Understanding these root causes is essential since it helps them relate to how the features of your offering uniquely overcome them.
2. Describe the dire consequences of not solving their problems. It should include a framework for determining:
  - A. Quantitative analysis in terms of loss of profits, revenues, market share, business effectiveness or efficiencies.
  - B. Qualitative considerations adversely affecting prospect's and other stakeholder's careers and emotions. This is essential to ensure that the prospect and other decision-makers perceive solving this problem as a high-priority activity.
3. Identify, at a very high level, alternative approaches to solving their problems and highlights how your approach (not the features) is best suited to solve their problems. This is the most important part of an explainer since it aligns the prospect's thinking with your vision and makes them receptive to your offering's features.

### A well written explainer never mentions your offerings.

It focuses exclusively on educating the prospect on understanding their problems and building a mental framework for solving the problem that is aligned with your offerings.

An explainer establishes your relevance to the prospect and encourages them to perceive you as a trusted partner.

If your offering solves multiple problems, you may want to consider creating a different explainer for each specific problem.

## When do you use an explainer?

You use an explainer when a prospect has demonstrated some level of awareness or interest in your company or its offerings. In response to such an awareness or interest, your salesperson would have followed up with the prospect to identify what problem they were trying to solve.

As we discussed earlier, in response to the identification or description of the business problem by the prospect, the salesperson should either present the explainer in person, via online meeting or share it for offline consumption.

After presenting or sharing an explainer, the salesperson should get the prospect to confirm their agreement on the root causes of the problem. The salesperson should then offer to collaborate on determining the quantitative and qualitative consequences of the problem specific to their organization. This enables them to identify all the decision-makers and build a Loss Calculator that quantitatively summarizes the problem and builds the groundwork for procuring the budget to acquire a solution to the problem.

The salesperson should encourage the sharing of the explainer with as many stakeholders and decision-makers in the prospect's organization as possible.

It is very likely that the exploration of one problem may lead to the identification of additional (and possibly higher priority) problems. Having ready access to explainers for each such problem greatly helps the salesperson maintain the forward momentum of the sales cycle.

With a deeper understanding of their problems and the right approach to solve them, the prospect will be very curious to learn how your offering solves them. This is where Guided Tours come in handy (we'll discuss those later!).



## Key components of an explainer

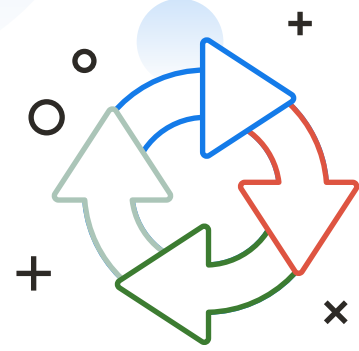
### 1. Enable your sales team with an explainer in two formats:

**A.** As a presentation for in-person confirmation of the problem and explanation of the root causes, consequences and alternative approaches to solve the problem. This could be a series of 4-5 slides as a part of your presentation library.

**B.** As an offline content piece that can be consumed by your prospect when and where they want. Preferably, it should be a 2-5 minute video. If that is not possible then a slideshow with infographics and a voiceover works too. As far as possible, avoid lengthy textual descriptions since most readers will not go through it.

**2. An email template or a script** for soliciting the collaboration for determining the quantitative and qualitative consequences of the problem specific to the prospect's organization.





## Explainer Best Practices

- 1. Explainers deepen the sense of pain and urgency.** They do NOT talk about your customer success, use cases for your products, special offerings, or capabilities.
- 2. Explainers provide a moment of reflection** and a new way of grouping pain-point indications into a generalized problem that warrants further diagnosis.
- 3. Explainers strike a conversational tone.** They invite the prospect to enter into a low-pressure conversation with a sense of dignity, curiosity, and humility.
- 4. Explainers should not sound or feel *promotional*,** overly confident, or inauthentic.

- 5. Explainers should not exceed**

**2-5 minutes**

**to consume.** \_\_\_\_\_

This encourages the recipient to view it right away as well as share it with relevant colleagues.

Remember that Explainers play a crucial role in the early stages of a customer-driven buying process, emphasizing the prospect's strong desire to be in control of a do-it-yourself discovery and learning journey.

To learn more about other engagement objects, please see "9 Engagement Objects that fuel B2B Sales Enablement".



## GUIDED TOUR

Guided Tours provide an effective and lower cost alternative to live in-person product demonstrations.

Guided Tours enable your salespeople to engage the prospect without the delay or costs of scheduling a pre-sales resource and developing a customized product demonstration. Effective Guided Tours greatly accelerate your sales cycle.

**Guided Tours help prospects understand how your product or service can solve their problems.**

## What is a Guided Tour?

A Guided Tour delivers inspired moments of “ah-ha” when prospects envision how using your product solves an important problem.



Each segment of a Guide Tour presents a use case for particular features of your offering. They demonstrate how customers can use these features to achieve superior business results — the value of using your offering.

Each use case captures a moment of truth that, when strung together, inspire the champion, mobilizer or consultant to build an internal consensus to buy or recommend your offering.

A Guided Tour is not an infomercial that uses hyperbolic excitement and the fear of missing out (FOMO) to coerce a buying action. Avoid slick promotional videos that over-emphasize general benefits and under-emphasize the particulars of how a featured set of functions solve prospects’ specific use case needs.

## When do you use a Guided Tour?

Your salesperson offers a prospect a Guided Tour after they have jointly concluded that the organization has a critical problem and have identified likely causes. This means the champion has already consumed some combination of Teasers and Explainers. In some cases they may have also seen a presentation of your offering.

Your most effective salespeople use Guided Tours only after the champion has become uncomfortable with the status quo and concluded that their organization must take action to avoid now-certain impending or compounding losses.

### Guided Tours convince prospects of the following:

1. Your salesperson has clearly understood their problems.
2. Your offering is an ideal solution to their problem.
3. It won't be risky to either recommend or initiate the internal buying process.



Your Guided Tours will also be used by your prospect to socialize your solution internally.

After presenting or sharing a Guided Tour, the salesperson should offer to help the prospect with the internal buying process. A Buyer's Guide enables a salesperson to achieve this effectively.

## Key components of Guided Tours

A Guided Tour is comprised of two components:

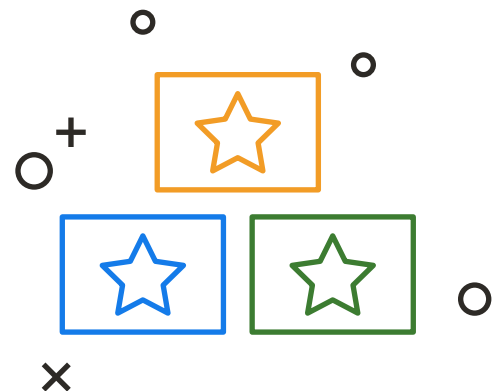
1. A set of independent video segments that each presents one use-case scenario that the customer will recognize as distinct, meaningful, and predictive:

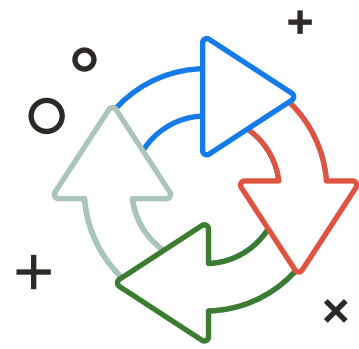
**“Yep. I can see how that set of functions help address our problem.”**

2. A presentation slide library that includes a slide to explain the context of a business problem followed by a slide embedding the video segment from #1 above. A salesperson can assemble and personalize a set of such use cases to personalize a Guided Tour for each customer’s needs.

When packaged with customer-specific insights and data, the personalized Guided Tour summarizes the benefits of the value-delivery process. Effective Guided Tours depict and explain the value-delivery process with a set of simple and concrete actions that lead to customer success.

Simple motion graphics or annotated infographics provide excellent additions to the package of videos.





## Guided Tour Best Practices

- 1. Guided Tours capture four to seven moments of truth** of your best presales engineer or subject matter expert giving an inspired demonstration.
- 2. Guided Tours demonstrate how your offering** can solve the prospect's problem. They do not sell or promote.
- 3. Guided Tours should be personalized** as much as possible to focus on each prospect's specific pain-points and to establish relevance.
- 4. Guided Tours should be as modular as possible** so that the prospect can easily understand your unique value proposition as it relates to them as well as share snippets internally to socialize your solution.
- 5. Guided Tours should include two next steps:**
  - A. Offer to diagnose the problem** on a group or company-wide basis
  - B. Information on how proceed on their own,** offering to let them download a Loss Calculator or relevant Case Study.

To learn more about other engagement objects, please see "9 Engagement Objects that fuel B2B Sales Enablement".



## LOSS CALCULATOR

As a general rule, customers will take action when they experience the status quo as more dangerous than making the needed improvement: buying your offering and solving a real problem. Now grounded in neuroeconomics, top sales producers know that loss aversion exerts a much greater influence than the prospects of gain.

This is why a Loss Calculator, which draws a crisp and vivid contrast between an attractive Future (achieved with the removal of the problem) and a negative, unwanted Present (resulting from the existence of the problem), is an essential sales enablement tool to accelerate the sales cycle.

The collaborative preparation of a loss calculation with the customer builds additional trust, earning your sales executive wider access to the customer organization and their influencers.

The process of building a personalized Loss Calculator gives your sales executive the “keys to the elevator”, earning the right to interact with affected stakeholders and laying the foundation for a proper business case and organizational change-management plan.

# LOSS CALCULATOR?

## What is a Loss Calculator?

A Loss Calculator aggregates the organizational losses of not making a needed change. It presents a vivid depiction of the negative consequences for the company and each stakeholder group.

A Loss Calculator uses internal company data to induce a needed shock to the customer, quantifying its current cost of doing business as usual –

It also uses verbatim anecdotes from affected stakeholders to personalize the need to solve a now Important AND Urgent problem, emphasizing the human costs and potential repercussions of inaction.

**“We’re losing \$15,000 per month the current way.”**

Loss Calculators combine quantitative data and qualitative user stories and anecdotes:

1. Quantitative data might include portions of direct and indirect spend of an organization, defect rates, or cycle times for lead to sale or quote to cash. This also might include lifetime customer value, churn rates, or net promoter scores.

**2. Qualitative aspects of Loss Calculators tell a human story of pain, frustration and resentment about the current way of getting things done.**

These aspects come from interviews and focus group discussions with affected users and stakeholders.

Depending on the nature of the problem and its organizational context, collecting these qualitative aspects may include interactive surveys, questionnaires, or workshops.

From there, the customer and sales executive will begin sketching user stories that start with a job position or Role as your hero or protagonist. User stories then frame and name Indications of Pain as suffered by a particular stakeholder or group, introducing the villain or antagonist as the personification of the Root Cause of the problem. A crisp focus on the antagonist in each user stories enables you to paint a picture of negative Consequences to the Role and the organization.

At each step of the User Story, use anecdotes and verbatim passages from your interviews, workshops or surveys.

# LOSS CALCULATOR?

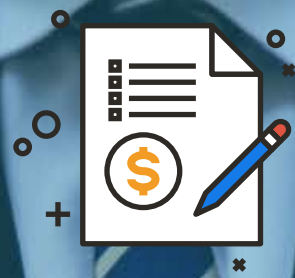
## When do you use a Loss Calculator?

Your sales executive needs to influence a larger group of affected stakeholders and decision influencers beyond the prospect who initially contacted them.

The necessary first step starts with their solidifying an effective collaborative relationship with the prospect through Teasers and Explainers and by confirming that their organization has specific Indications of Pain, symptoms of a deeper problem that your product can solve. In addition, the prospect may have delved into your Guided Tours, confirming the relevance and consequence of one or more use cases. They have confirmed that your type of product can solve the problems that they have identified as worth solving.

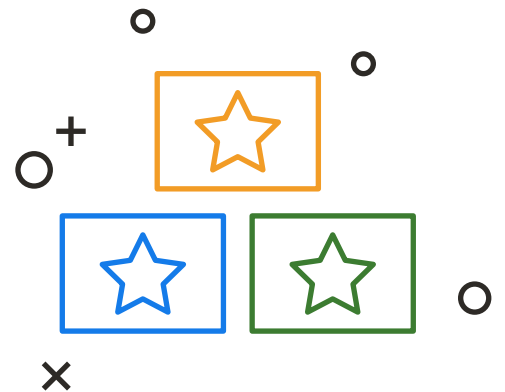
Once these conditions are satisfied, it is a good time for the salesperson to introduce the concept of a Loss Calculator to the prospect.

The results of the Loss Calculator strengthen a Business Case to justify and procure budget for acquiring your offerings. Hence your salesperson should advise the prospect and other stakeholders to collaborate on building a Loss Calculator before they approach executive management to to procure funding for acquiring your offering.

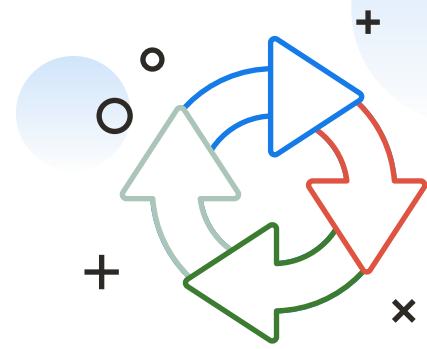


## Key components of a Loss Calculator

- **Trigger list** of questions to ask various stakeholders who may experience one or more indications of pain
- **Spreadsheet** that names, frames, and quantifies
  - Areas of money leakage, defects and waste
  - Baseline costs of doing business today with actual customer data of time, money, and full-time equivalents
  - Aggregate total of losses from current operations
- **Presentation with vivid datagraphics** of two to five user stories, depicting the negative consequences of the current way of doing business on specific stakeholders and the organization as a whole



# LOSS CALCULATOR?



## Best Practices for Loss Calculator?

- 1. Loss Calculators should focus only on the facts.** Use best available company data and verbatim anecdotes.
- 2. Loss Calculators should quantify the losses** in a simple to understand spreadsheet. It should be possible for decision-makers to easily extrapolate the sample data to estimate enterprise-wide losses.
- 3. Loss Calculators should be a collaborative effort** involving multiple stakeholders and decision-makers. This is essential both for ensuring comprehensive coverage of losses as well as to accelerate buy-in from the relevant stakeholders.
- 4. Loss Calculators should focus on the company's value gap** due to the absence of your solution. It should not speculate on the benefits your solution will deliver.

To learn more about other engagement objects, please see "9 Engagement Objects that fuel B2B Sales Enablement".



# BUYER'S GUIDE

A prospect needs to achieve four things before they can purchase your offering:

1. Raise the priority of their business problems to the highest level possible
2. Build consensus that your offering is the “best overall” solution and establishes you as a trusted vendor
3. Develop a business case articulating an investment analysis that justifies the acquisition of your offering
4. Overcome any doubts about achieving the benefits promised by your offering.

Unfortunately, most prospects do not have a good understanding of this process. They stumble along and often struggle to gain consensus. The salesperson who clearly sees a “qualified” opportunity is frustrated with the unending and unpredictable sales cycle.

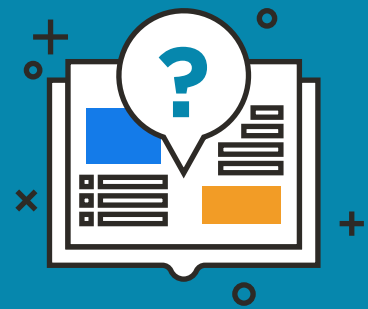
Your sales team needs content that navigates the prospect through the buying process by providing them guidance that positions your offering as the “best overall” solution, builds a business case to procure budgets and mitigates the risks inherent in undertaking change.

A Buyer’s Guide dramatically shortens the length of your sales cycle. This helps your sales team sell more, faster.

## What is a Buyer's Guide?

A Buyer's Guide enables your sales team to help navigate the prospect to successfully achieve the following four things:

1. Explain the problem, quantify the losses and instill a sense of urgency to solve the problem.
2. Survey the relevant solution options and recommend the best overall solution to the problem.
3. Build a business case to allocate appropriate budgets for acquiring and implementing your offering.
4. Describe an organizational change management plan that will fully derisk the introduction of your offering into their organization.



The Buyer's Guide de-risks their business decision by answering three essential questions:

1. *How do we know that your recommended solution is the best overall for us, both in terms of capabilities and pricing?*
2. *How will you implement the proposed solution, taking into consideration our current business capabilities AND weaknesses?*
3. *How will you deal with the all-but-certain disruptions to our business operations that always ensue the best-intended improvements?*

By following your Buyer's Guide, your prospect, champion or change mobilizer can satisfy management that they have conducted adequate sourcing due diligence and made an exhaustive effort to research, profile, and quantify the relative business impacts and risks of alternate solutions. They will also inspire confidence in their ability to successfully implement organizational change management and ensure user adoption.

## When do you use a Buyer's Guide?

Salespeople use Buyer Guides when the advocate or change mobilizer within an account needs to socialize the problem, the need to solve it, and procure funding for the acquisition and implementation of a solution to the problem.

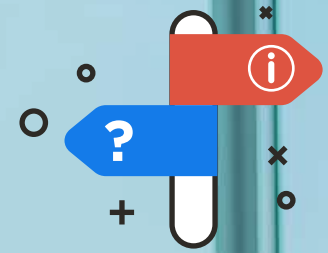
That means prior to providing the Buyer's Guide:

1. You have assisted your advocate or change mobilizer in identifying a business problem worth solving and its probable root causes, using customized Teasers and Explainers.
2. You have provided customized Guided Tours of your product, featuring four to seven use cases with additional commentary about how your offering can solve your customer's problems.
3. You've provided a Loss Calculator by which they can calculate the cost of inaction. Loss calculations will give your advocate or change mobilizer the right to diagnose the whole problem and build a comprehensive business case for a solution.

With these preconditions in place, we recommend that you provide a Buyer's Guide.

### But why a Buyer's Guide at that point?

Because your prospect needs to build a consensus within a diverse and often skeptical or contentious stakeholders. This can only be achieved by building a bulletproof business case.

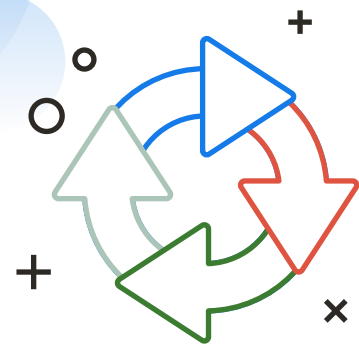


## Key components of a Buyer's Guide



A Buyer's Guide is a fairly detailed and structure content piece that includes:

- 1. A succinct definition and vivid depictions** of the business problem and related consequences
- 2. Industry benchmark of peer organizations** and how they have addressed similar business problems
- 3. Survey of solution alternatives and criteria** by which to quantify the strength, weakness, opportunities and threats of each option, including internal options, competitors, or just doing nothing
- 4. Financial analysis models** for calculating the realistic costs of inaction and the potential economic benefits for a featured solution, including:
  - A. The total cost of acquisition of the chosen solution, including implementation
  - B. The total cost of ownership or service, including multi-year operational costs
  - C. The potential Return on Investment (ROI) calculated by the progressive reduction of losses inflicted by the problem
- 5. Organization Change Management (OCM) plan** that includes guidelines for the following:
  - A. Multi-phase project model
  - B. Communications and engagement plan
  - C. Governance structure, steering committee charter and representation
  - D. Easily measurable and verifiable business metrics to determine success
- 6. Templates** for RFP to solicit proposals from multiple vendors, Loss Calculator and Business Case



## Best Practices for Buyer's Guides

- 1. Use the customer's definition of the business problem and success criteria,** incorporating their language, analogies, and user stories.
- 2. Provide practical guidance, tools, and reference artifacts,** minimizing the amount of work that your champion must perform.
- 3. Supply vivid depictions of the problem, its root causes and negative consequences,** maintaining a shareable collection of figures, photos, diagrams and infographics.
- 4. Disclose the risks associated with implementing your solution,** using this to earn the trust and gratitude of the customer.

To learn more about other engagement objects, please see "9 Engagement Objects that fuel B2B Sales Enablement".



# CASE STUDIES

Case Studies make your solution more concrete, credible and relevant to a prospect. They translate your offering's features and benefits into moments of truth—

**“Oh yeah. I understand why we might need that too.”**

Customers love Case Studies for their narrative power to simplify a new or complex solutions into more human terms.

Case Studies establish that other companies have solved similar problems using your solution. That makes your solution seem less risky and its benefits more believable.

Finally, Case Studies assist in positioning your solution as viable and your company as trustworthy.

## What is a Case Study?

A Case Study describes the journey that one of your customers took in solving a problem with your offering. It starts with the discovery of the problem by the customer and the diagnosis of the root causes and consequences of inaction. It then briefly narrates how the prospect successfully built the business case to acquire your offering and how they navigated through organizational change management to successfully deploy your offering and gain user adoption. Finally, it lists quantitative and qualitative benefits accrued to the business and stakeholders due to adoption of your offering.

An effective Case Study conveys a sense of the Customer Journey and brings the reader to the conclusion:

**“This could work for us too.”**

---

However, what makes Case Studies effective today represents a big change from traditional success stories and case studies.

### **The tough decisions include:**

- Is this a problem worth solving?
- What are the general contours of workable solutions?
- Is it worth going external with a vendor or keeping it in-house?
- Should we be in “let’s wait and do this later” mode or act now?
- How do we align with our priorities? What use cases will deliver high value?
- Which features add tangible value and solve the targeted problem?
- How we will resolve the change-disruptions that always ensue when introducing a new element (your offering) into a business environment?

## What is a Case Study?

In a narrative sense, effective Case Studies create a change simulation, a way to help a customer reality-check their next steps and de-risk organizational change management.

**1. Traditional Case Studies often highlight well-known “marquee” logos**, customers who often have access to huge budgets and a small army of project specialists. Effective Case Studies showcase customers with similar organizational dynamics, business challenges, and budget constraints. The most effective Case Studies will mirror the emotional and physical reality of your Ideal Customers, giving today’s buyer a sense and feeling of “Hey they did it. So can we.”

**2. Traditional Case Studies rely on document PDFs and slide presentations** that upon sending to a customer become dead, orphaned content. Effective Case Studies use connected packages that may contain hyperlinks, videos, infographics, and interactive multimedia slides. The connected packages keep the salesperson informed about their use and sharing within and throughout the customer’s organizations as well as external distributions (suppliers, competitors, consultants).



## When do you use a Case Study?

Salespeople introduce Case Studies to a prospect after there is good agreement about the problems worth solving and after they have received an overview of your offering. The Case Study helps them build a consensus among their stakeholders around making needed improvements using your offerings.

**Case Studies are also used by prospects as a part of the business case to acquire your offering.**

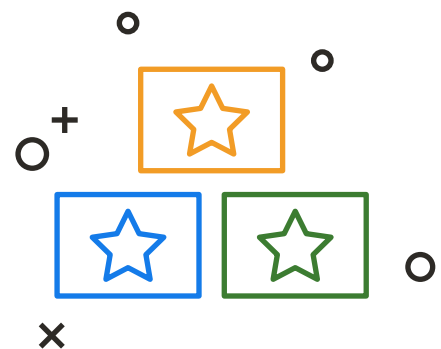
The narrative of the Case Study helps executive management and decision-makers easily visualize the relevance and value of your offering. This leads to speedy approval to release funding to buy your offering.

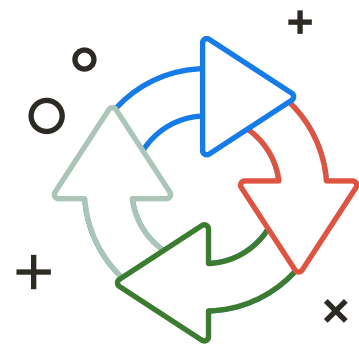


## Key components of a Case Study

An effective Case Study consists of the following components:

- 1. Situation analysis** that summarizes in a third-person narrative voice the key facts about a featured customer's organization, the problems they faced, how they diagnosed the root cases, understood the consequences of inaction and the credible options the customer considered to solve the problem.
- 2. Detailed buyer journey** that recreates the organizational dynamics at key decision-points, the criteria used in making those decisions, and why they selected your solution as the best overall for their needs.
- 3. Risk mitigation plan** by which the customer surfaced the most probable or highest impact risks associated with deploying your solution and how they proactively addressed each identified risk. Video links summarizing how the customer planned and successfully executed an organizational change management are particularly useful to prospects.
- 4. List of quantitative and qualitative benefits** accrued to the organization as well as to individual stakeholders. Video links showing user testimonials are highly desirable, if available.





## Best Practices for Case Studies

- 1. Focus with unwavering intent on user stories,** how someone in a particular role experienced the consequences of an identified problem.
- 2. Depict with vivid narrative details the consequences of the problem to solve,** reinforcing the sense of urgency and real costs of inaction or indecision.
- 3. Make it easy for customers to self-identify with organizational dynamics and situations featured in the case,** amplifying the personal high-stakes conflicts and how your customer-as-hero rose to the challenge and how they overcame each key challenge.
- 4. Emphasize why the customer favored particular features of your solution,** conveying a sense of watching them make the decision to proceed using features of your product as the exemplar ... by which to compare competitors and find them insufficient.
- 5. Disclose the gritty details of change-disruptions that always ensue when introducing a new way of working.** In the words of customers or experts familiar with the particulars, have them share how they anticipated key risk and put in place a remediation plan.

To learn more about other engagement objects, please see "9 Engagement Objects that fuel B2B Sales Enablement".



# INTERVIEW PODCAST

Interview Podcasts provide a crucial and oft-missing bridge in the Customer Journey: an immersive, lean-back way to learn about how other successful customers selected and implemented your product.

## Podcasts, really?

Did you know that today, more than 30% of Americans listen to podcasts? We listen while we commute or travel. We listen while we walk, jog, or workout. Some of us stand in lines or handle lightweight tasks at work while listening to podcasts.

Chances are good that 30 percent of your customers listen to podcasts. And if your customer segment skews younger, that figure could be much higher.

## Tell me a story

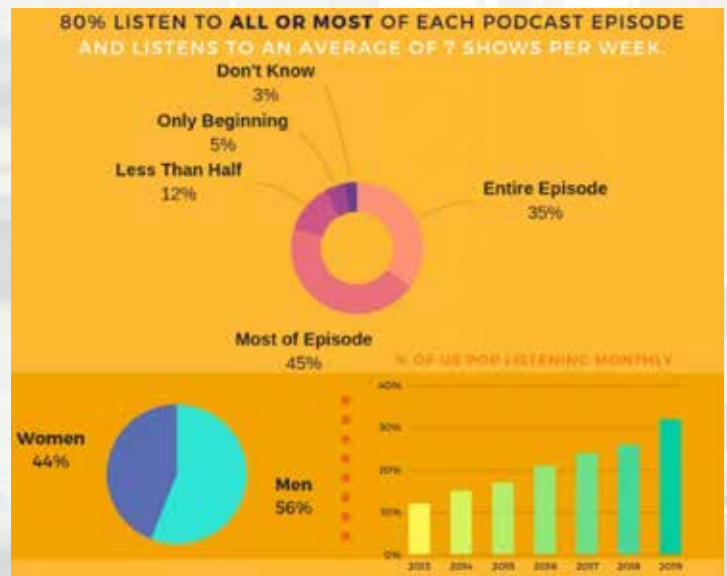
We love stories, especially about someone like ourselves.

We go all in on stories about someone who rose to a challenge, grappled with all sorts of issues and adversaries, and prevailed as the hero.

Otherwise busy and easily interrupted customers seek out and love Interview Podcasts. They love the spaciousness to hear the emotional truth that lies beneath the apparent facts. They want to hear that “It rings true.” They want to feel, “Yep, that sounds about right”. They want to confirm, “I believe this person”.

Interview Podcasts enable your successful customers to inspire your new prospects.

Prospects use Interview Podcasts to power through the sometimes hard and always detailed work of building a comprehensive business case with a de-risked organizational change management plan.





## What is an Interview Podcast?

Interview Podcasts are edited audio recordings of customer interviews. Editing entails the insertion of graphic cover pages (start and finish) with active hyperlinks to a call to action, the next podcast in the series, and subscription access to other podcasts.

Unlike many “happy talk” podcasts with lots of fluff and surface-level impressions, Interview Podcasts keep it real. The interview prompts Customers to share the lessons learned throughout the Customer Journey.

In a first-person narrative, Interview Podcasts disclose the root causes of a persistent and urgent business problem. Customers share why they chose your product over the competition. Interview Podcasts call attention to the actual problems that customers encountered, how they overcame those challenges and showcase how they solved an important business problem with your products.

## Interview Podcasts keep it fresh and compelling.

They help you earn trust as a credible partner.

With the aim of authenticity, Interview Podcasts involve an interviewer from your company and one successful customer or three specialists of the customer organization. This might include a business analyst, project manager, or a line of business executive who supervised the project. The participants should have direct knowledge of each of the key phases of the customer journey. They should have a working knowledge of how the problem was diagnosed and root causes identified.

For the interviewer, most Interview Podcasts will use a sales leader or a customer success manager.

Effective Interview Podcasts rely on a curious, conversational tone, and a set of thoughtful trigger questions that will elicit deeper, more nuanced emotional disclosures from the customers.

## When do you use an Interview Podcast?

Interview Podcasts work best after the customer has identified a business problem worth solving and its likely root causes. The customer will have a good understanding of the problem to solve and will curate a set of explainer videos, presentations and infographics to educate his or her stakeholders

The prospect will have engaged with Guided Tour videos and relevant Case Studies. More than likely, the Customer has begun developing a business case, using a Buyer Guide and related resources. At this point, Interview Podcasts make their greatest contribution by keeping the prospect engaged and nurtured.

Interview Podcasts inspire and reassure the champion or change mobilizer—

**“Hey, they did it. So can I!”**

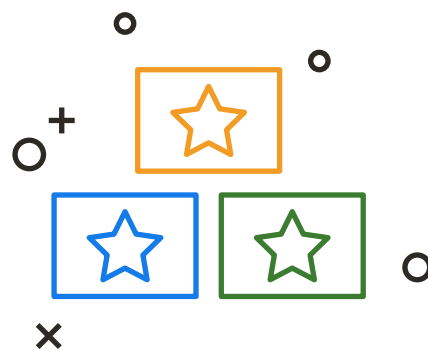


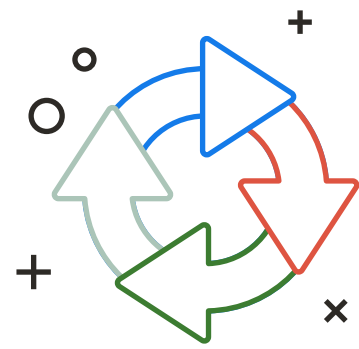
## Key components of an Interview Podcast

An Interview Podcast includes the following components:

- 1. Trigger questions** in a talking point-agenda document for the Interviewer to share with the Interviewee ahead of time and to pose in the interview.
- 2. Edited audio recording** of the customer as they disclose their journey from symptomatic problems to success with a return on investment.

Depending on the number of offerings, vertical industries or simply the availability of willing customers, you should try to create multiple podcasts. Listeners enjoy the diversity of perspectives and experiences.

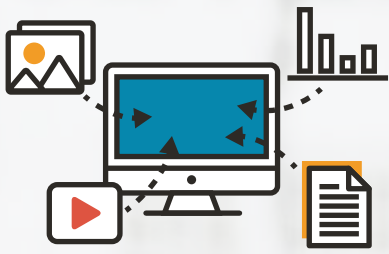




## Best Practices for Interview Podcasts

- 1. Focus on the emotional dimension** of the customer journey, prompting the interviewees to disclose their thoughts and feelings about key decisions and consequences.
- 2. Make the customer the protagonist** or hero of the narrative, emphasizing the personal high-stakes conflicts that they encountered and how they “framed and named” the real issues and solved them.
- 3. Keep it entertaining**, use a conversational tone, be curious and incorporate ambient background music to keep the listener’s brains engaged as they deal with small interruptions from their immediate physical environment.
- 4. Draw out how their collaborative partnership with your team contributed to success.** Have them talk about how your sales and customer success teams orchestrated the delivery of your solution.
- 5. Frame their participation as a career enhancement**, validating how they added value to their organization and earned themselves additional levels of recognition as an effective problem-solver.
- 6. Produce an edited full-text transcript** for use as a reference in building other sales enablement tools.

To learn more about other engagement objects, please see “9 Engagement Objects that fuel B2B Sales Enablement”.



# RICH MEDIA SLIDE LIBRARY

Presentations are one of the most important tools used by a B2B sales team to engage an audience and to communicate their unique value proposition to the prospect. Unfortunately, most presentations do more harm than good for the following reasons:

- 1. Monolithic and large “Presentation Decks”** are overwhelming for the sales team to modify due to unpredictable dependencies between different slides in terms of messaging and navigation. This forces the sales team to use these decks as-is and without personalizing them for a specific customer situation. The audiences find such “canned presentations” highly irrelevant.
- 2. Traditional presentation tools** such as PowerPoint encourage bulleted text with monotonous presentation themes and slide templates. The audience quickly gets bored and distracted.

As a result, all the effort related to lead qualification, engagement and nurturing fail to bear results at the most critical juncture in the sales cycle. Outdated traditional sales enablement techniques related to presentations are a significant root cause of poor sales performance.

## **Effective sales enablement practice prescribes:**

- 1.** A slide library that organizes presentation slides in appropriate categories that encourages the salesperson to easily personalize the presentation based on the prospect’s requirements.
- 2.** Each slide should minimize the use of bulleted texts and replace them with relevant images, illustrations, charts, videos and animations. This will engage the audience as well as make your slides self-explanatory. Furthermore, they will enable your team to consistently deliver your brand experience with greater confidence

This is why you should replace your traditional “presentation decks” with a rich media slide library.

## What is a Rich Media Slide Library?

A rich media slide library is a collection of logically organized slides that enables a sales person to easily and quickly assemble an engaging and personalized presentation that is perceived by the audience as highly relevant to their needs and retains their attention during the entire pitch. Each slide uses appropriate rich media elements with minimal text to intuitively communicate the message.

Providing a slide library instead of ready-to-use presentation decks encourages the sales team to personalize the presentation with highly relevant content.

Minimizing text and enriching each slide with rich media elements ensures consistent delivery of your brand experience, engages audiences and retains their attention. The sales team feels more confident when delivering personalized, rich media presentations. Prospects love sharing such presentations internally with other decision makers.

Such a rich media slide library needs to be distributed through a cloud-based shared environment to ensure that the sales team always has access to the most updated slides. It should enable easy assembly of slides into relevant presentations and enable online sharing with the audience. A highly desirable feature is the ability to track if the prospect viewed the presentation after it was shared with them. This gives valuable insights into their purchasing intent to the sales team and helps close deals faster.

In addition to the slide library, also consider organizing your other rich media content in a cloud-based environment. This will enable the sales teams to insert relevant content onto the slides to further personalize their presentation.



## When do you use a Rich Media Slide Library?

Your sales team should use the Rich Media Slide Library EVERY TIME they have to present to B2B sales prospects. This has the following benefits:

1. It will encourage them to think about the customer's problem and select the appropriate slides to ensure that their presentation is relevant to customer's needs.
2. It will ensure that the sales team is using the most recently updated slides and content.
3. It will keep the presentation focused and brief.

It should not take more than

# 5 minutes

to drag and drop relevant slides from a logically organized library.

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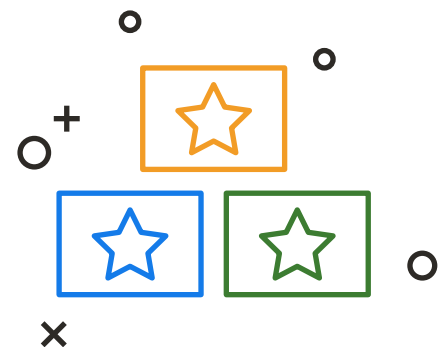


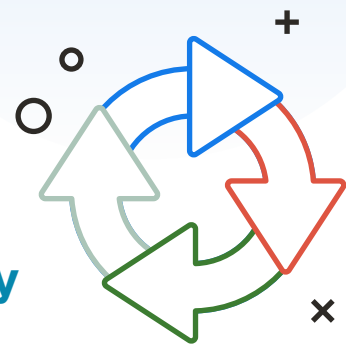
## Key components of a Rich Media Slide Library

Marketing services and sales enablement teams should create appropriate slides for each for the following categories:

- 1. Customer Problems and Pain-points** - Create 1-3 slides explaining each customer problem in terms of the roles that experience the problem, root causes of the problem and consequences of inaction.
- 2. Loss Calculator** - A set of personalizable slides that enable a salesperson to quantify the losses that the prospect is facing due to the lack of value delivered by your offering.
- 3. Solution Framework** - A high level overview of your approach to solving the customer's problem.
- 4. Use case driven Guided Tours** - breaks the overall solution framework into granular use cases and depicts how the features of your offering contribute to solving a customer's problem.
- 5. OCM Best Practices** - A series of slides that describes how your team will ensure flawless deployment and adoption of your offering into the prospect's organization and greatly de-risk their decision.
- 6. Call to Action / Next Steps** - A series of slides that propose the next steps following the presentation. These may include an offer to collaborate to diagnose the problem, build detailed requirements, help building a business case, or a proposal to finalize the purchase decision.

The slides should avoid the monotonous, uniform layout of slide templates. They should minimize the use of text and appropriately use rich media elements to intuitively and engagingly communicate your message.





## Best Practices for Rich Media Slide Library

- 1. Focus on Customer's problems** - instead of boasting about your company and offering. This will establish relevance and ensure better engagement.
- 2. Avoid monotonous slide templates** - instead, use the slide as an open canvas to depict your message. This will prevent your audience from getting easily bored and will enable you to communicate more freely.
- 3. Minimize text on the slides** - use rich media elements such as images, illustrations, infographics, charts, diagrams, animations, videos and 3D models. This will make your message easy to understand and retain the audience's attention.
- 4. Use "walk-in" videos** - Use a full screen video on the first slide with vivid portrayals of people and situations with which the customer will identify. As your audience trickles in to the meeting, they will be glued to watching this video instead of getting distracted with their emails and text messages. The video subtly hints at the fact that you will soon be presenting something that is relevant to them.
- 5. Build a rich media content library** - This will make it easier for the presentation design team to deliver rich media slides as well as for the sales team to personalize the slides with content relevant to each customer situation.

To learn more about other engagement objects, please see "9 Engagement Objects that fuel B2B Sales Enablement".



# SALES PROPOSAL TEMPLATE

When requested to submit a proposal, most sales executives deliver the following:

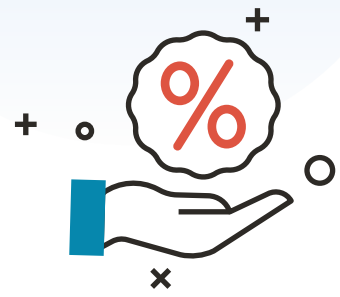
1. Abbreviated summary of the product features and benefits
2. Various options of the offerings and unit prices
3. Pricing customized to prospect's requirements
4. Terms and Conditions of sales

So what is wrong with this?

There are a few critical missing items that delay decision making and potentially destroy trust:

1. **A brief description of the problem**, its root causes and unbearable consequences that initiated the buying process. This is very important since it is likely that the decision-makers who are involved in the approval of the proposal may not have been involved in the initial buying process. It is incorrect to assume that your contact has effectively communicated the problem and built a solid business case for the acquisition of your solution.
2. **Clear articulation of your unique value proposition** - Why is your solution best suited to solve their problem? This is different from listing all your features and benefits. In a competitive situation, unless you have established yourself as the best overall solution for their problem, you are leaving the selection of your solution to chance.
3. **Full disclosure of the costs of acquisition, deployment and maintenance of your solution** - This often results in setting incorrect expectations and unrealistic budgets. The surprised customer loses trust in your team when they are confronted with unforeseen risks and liabilities.

A well thought out Sales Proposal Template guides a sales team to summarize the buying journey and deliver a comprehensive proposal that retains relevance, positions you as a trusted partner and accelerates decision making.



## What is a Sales Proposal Template?

Sales Proposal Templates provide a comprehensive framework to create a standalone document that can answer the following questions for the decision makers:

1. What problem are we trying to address? Can it wait?
2. Why is this offering the best overall?
3. How much will it REALLY cost? Is this cost justified?
4. How likely are we to successfully solve the problem? What are the risks?
5. Why can we trust them (vendor)?

Sales Proposal Templates provide a reproducible, scalable way for sales executives to answer these buyer due-diligence questions. Effective Proposals assist sales executives to satisfy the needs and concerns of all stakeholders, reducing the level of unsupported opinions and the political power games that often follow. They are one of the most important sales enablement tools by which sales executives can maximize their close rates.

When implemented as a standard operating procedure, Sales Proposal Templates eliminate unaddressed risks ... surprises that customers hate and kill deals in their tracks.

## When do you use a Sales Proposal Template?

Effective Proposals pay their highest dividends when requested by a sincere customer who has developed a comprehensive business case and has access to funds. This request for a proposal should arrive unprompted to the sales executive.

This means framing the proposal as a prized resource and something only customers with a good requirement-success fit receive. This also means that the sales executive should not provide a proposal to a prospect as a tool for building the business case.

Instead, sales executive should have the customer use the Buyer's Guide and related resources (such as Case Studies, Loss Calculator) to build a business case and an organizational change management plan.

Sales executive should co-create a Proposal with the customer, using the Sales Proposal Template as a collaborative guide.

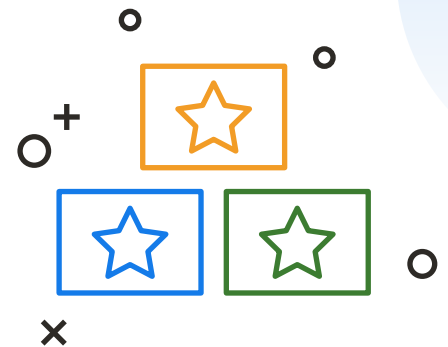
Together, the sales executive and customer will use the Sales Proposal Template to produce an internal-only decision package. They will optimize that decision package for inspection by a remote and skeptical decision-maker and heavy-weight influencers.

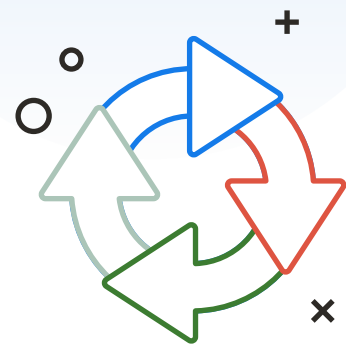


## Key components of a Sales Proposal

An effective Proposal consists of the following components:

- 1. Interactive presentation template** for building an effective proposal
- 2. Trigger questions** for building each section of the proposal
- 3. Visual explanations** that depict each phase of the customer journey, starting with the initial Indications of the problem and criteria for solving that problem and ending with a vetted business case and organizational change-management plan.
- 4. Clear description of the unique value** of your offering in solving the problem to establish it as the best overall solution.
- 5. Comprehensive and clear description of the total cost** of acquiring, deploying and maintaining your offering.
- 6. Honest disclosure of all the risks** and recommended mitigation plan.





## Best Practices for Sales Proposal

- 1. Focus on the journey that your particular customer took**, and not on product features, pricing, and deal points.
- 2. Demonstrate with authority and detail that the prospect performed buying due-diligence**, narrating the steps and decision points.
- 3. Use the framing and naming terms of your customer**, avoiding the use of new, vendor-specific terms that raise needless suspicions.
- 4. Tell the whole, factual truth about what it will take to implement**, calling attention to real and probable risks associated with your product, the particular delivery team and methods, and organizational issues within the customer organization.
- 5. Ensure that your differentiated brand experience** is preserved and not lost in dull PDF documents. Leverage rich media if your offering is visual in nature (as is the case for hospitality, real estate, media, luxury brands, etc.)

To learn more about other engagement objects, please see "9 Engagement Objects that fuel B2B Sales Enablement".



## A PARTNER DEDICATED TO IMPROVING YOUR SALES PERFORMANCE!

We understand the changes in customer behavior that adversely affect your sales:

- Audiences are quickly distracted.
- Prospects hate and block unsolicited outreach, if it is not relevant.
- Customers love to binge on bite-sized and engaging content.
- Buyers prefer to self-discover solutions to their problems.

So how do you enable your sales teams to be effective in this new environment?

We believe that there three pillars to your effective sales enablement:

1. Sales messaging that clearly articulates your unique value to your audiences.
2. Content that is relevant and stunning as well as easy to customize.
3. Technology that wows your audience, enables your sales team, engages your customers and delivers buyer insights to close more deals, faster.

Zoomifier is unique in that it delivers all of the three pillars. We have worked very closely with sales and marketing teams at leading brands across multiple industries to deliver measurable improvements in sales performance.

**Let's partner to close more deals, faster.**



**LET'S PARTNER**

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