

critical *success* factors

in-person messaging events



Build a strong core review team

- Usually up to 3 people
- Subset of workshop participants (no outsiders!)
- Internal credibility and ownership of message's success
- Must be on Kickoff Call



Get the right people in the virtual room

- Up to 8 people
 - Fully engaged for 2 days
- Cross-functional roles
- Sales
 - Marketing
 - Product Marketing
 - Delivery
 - Support
 - Executives



Nominate three people for intake interviews

1. Visionary/thought leader
2. Customer-facing, front-line insight
3. Owner of messaging/market insight



Identify the target buying committee

- Focus on organizational goals and challenges
- Determine who is on the buying committee and role in the purchase
- Should be chosen by/during Framework Call



Name a decider for the workshop

- Kicks things off, sets expectations, breaks ties
- Often (but not always) the workshop sponsor
- Things to consider: longevity, credibility, group dynamics
- Should be chosen by/during Framework Call

customer *acquisition* messaging

▶ in-person workshop 2-day agenda

day 1

- **Lay out your strengths**
Validate what makes you different.
- **Identify the business impact**
Review key industry trends and connect them to your customer's strategic initiatives.
- **Pinpoint their exposures**
Explore the flaws in how they're currently addressing the trends and the consequences of not changing.
- **Show them a better way**
Reveal new thinking about the problem and outline the better way to address challenges and meet their objectives.
- **Homework**
Create a visual that depicts the story you've built. Find industry stats that exemplify the pressures and challenges.

day 2

- **Tell Your Story and Capture It**
Finish building your Why You Story.
- **Visual Storytelling Fundamentals**
Deliver homework, explore messaging with visuals, learn Big Picture concepts and practice them.
- **Build The Why Change Visual Story**
Create an engaging, compelling conversation through visual storytelling.
- **Event Debrief and Next Steps Discussion**
CVI consultant, CVI Sales, Customer Sponsor and Customer Project Owner plan next steps.



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virtual messaging events



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Get the right people in the virtual room

- **Up to 8 people**
- Fully engaged for three half-day sessions

Cross-functional roles

- Sales
- Marketing
- Product Marketing
- Delivery
- Support
- Executives



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engagement *timing*

virtual workshop details



day 1

outline



day 2

draft



day 3

story

Pillar 1: Differentiation

- Group differentiators from intake
- Align to customer challenges
- Discuss & decide

Pillar 2: Customer Context

- Customer goals
- Key trends
- Customer status quo & risks
- “The pivot” to change their thinking
- Better way & outcomes

Try on Why Change Story

- Align key points
- Add color and detail

Try on Why You Stories

- Define customer challenges
- Build your solution stories
- Add examples & final details

Visual Storytelling

- Intro concept, brainstorm assignment

Finalize Why Change Story

- Model story and visual ideas
- Select final visual

Finalize Why You Stories

- Clarify & strengthen
- Add supporting statistics
- Model final stories

Workshop Wrap

- Next steps, deliverables

