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 *expansion* messaging

day 1

- **Document your Results**
  Identify the business outcomes your customers were trying to achieve when they originally chose you and how you track them.

- **Highlight Evolving Pressures**
  Identify shifting internal and external pressures as a logical progression or evolution.

- **Identify "Hard Truths" & Risk of No Change**
  Explore potential missed opportunities both internally and externally of staying on the same path. Emphasize the potentially harmful risks and repercussions of not evolving or keeping up.

- **Upside Opportunity**
  Quantify the benefits for making the change.

- **Map Customer's World to Your Solution**
  Find your value wedge; find your differentiation in relation to customer business goals.

- **Homework**
  Create a visual that depicts the story you've built.

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 Evolve 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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- Fully engaged for three half-day sessions

Cross-functional roles

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engagement *timing*

day 1
outline

day 2
draft

day 3
story

Pillar 1: Capabilities & Enablers
- Group capabilities from intake
- Align to customer challenges
- Discuss & decide

Pillar 2: Customer Context
- Customer goals
- Business results delivered
- Evolving Pressures
- "Hard Truths" to change their thinking
- Upside opportunity & outcomes

Try on Why Evolve 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 Evolve 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