

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

why stay customer *expansion* messaging

▷ in-person workshop
2-day agenda

day 1

- **Client's Business Goals & Results**
Identify the business outcomes your customer was trying to achieve when they originally chose you and how you track them.
- **Prior Decision Process**
Map out a typical evaluation process for customers choosing your solution.
- **Risk of Change / Cost of Change**
How could business outcomes be at risk if they switch? What could go wrong?
- **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

- **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 Stay 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: Capabilities & Enablers

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

Pillar 2: Customer Context

- Customer goals
- Business results delivered
- Risk & cost of change to change their thinking
- Your competitive advances

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

