



Subscription release notes

Q1 2024

Your Corporate Visions subscription includes automatic access to current research, and product updates. In addition, there are some product updates you should know about.

Updates are listed below, with product-specific details on the following pages.

Skills training

- **Master Sales Leadership**: new program for frontline sales leaders
- **Why Return**: new program on how to win back lost customers
- Initiate Value renaming
- Switch-off of automated emails
- Coming in Q2: AI Fluency Challenges

TruVoice

- **TruVoice for Sales**, including TruVoice Coach
- **TruVoice for Customer Success**, including TruVoice Coach
- Coming soon: role-based dashboards

vPlaybook

- **Learning Center** updates
- **Great 8 Skills Coaching playbooks** for Sales and Customer Success
- Coming soon: vPlaybook mobile app

Ongoing Change Log

Skills Training

Master Sales Leadership skills training

Any sales organization is only as effective as its frontline sales leaders—they directly influence the performance of every seller in their teams. So it's no surprise that a 2022 Gartner survey identified that 60.9% of CSOs rate **improving sales manager effectiveness** as a top priority.

However, many sales leaders are left to rely on the skills that got them to a leadership position in the first place: their superior selling abilities. But leadership is an entirely different challenge. Leaders must think strategically, make hard judgement calls, and leverage their time to get the best from their teams—all without getting pulled into the detail or attempting to push every deal across the line themselves.

Without the right strategy and skills many struggle to manage their time effectively, resorting to firefighting and attending to the most urgent tasks or the loudest team members. The result: an ad hoc, reactive approach leading to overwhelm, lack of clear direction, underperformance, and missed targets.

Imagine instead a sales leader equipped to:

- **take control of their time**, focusing on high leverage activities that drive superior productivity;
- create a continuous cycle of increased team performance through **effective coaching**;
- deploy science-backed strategies to **optimize their leadership and coaching approaches** for specific team and individual profiles;
- **take control of pipeline and forecasting**, identifying and fixing issues early in the sales cycle;
- effectively guide team members to generate and close more **high value opportunities**;
- implement a clear, practical and structured monthly **leadership cadence** that embeds effective leadership behaviors into their everyday workflow.

Master Sales Leadership is a new program for both emerging and established frontline sales leaders designed to transform their “return on sales leadership”, embedding a consistent and high impact leadership approach across the entire sales organization. The program consists of two parts:

amplify team performance	optimize revenue management
<ol style="list-style-type: none">1. Increase performance by identifying—and acting on—key points of leadership leverage.2. Optimize productivity and consistency by embedded high-leverage activities into a structured leadership cadence.3. Harness Corporate Visions' unique research to identify the leadership style that's perfectly tuned to the team's performance profile.4. Learn the keys to effective 1:1 coaching.	<ol style="list-style-type: none">1. Build a consistently healthy pipeline by identifying issues early and coaching team members to fix them.2. Transform forecasting from guesswork to precision.3. Continually drive sales performance through identifying the accounts and opportunities that matter the most, and helping sellers close them through coaching and co-selling.

Master Sales Leadership course formats

Master Digital Selling is a **2-day instructor-led workshop** with digital support materials, and a **self-paced digital course**. Both formats have the same learning outcomes, cover the same concepts and follow the same sequence.

instructor-led (available now)

- In-person **or** virtual 2-day workshop
- **100% live-taught** by a Corporate Visions consultant
- **Interactive workbook** with application activities and concept summaries
- Extensive library of **resources, planners and job aids** to support real-world application
- *Coming at the end of Q1:*
 - **Post-workshop digital resources** providing comprehensive support on executing every part of the leadership cadence
 - **Digital learning modules** available as optional post-workshop refresher/reinforcement

digital self-paced / inline (available end of Q1)

- **Digital learning modules** designed for self-study, featuring videos of Corporate Visions consultants
- **Interactive workbook** includes activities at the end of each day of learning to apply new concepts and skills in the real world
- **Post-course digital resources** provide comprehensive support in implementing every part of the leadership cadence
- **Mini-booster** e-learning modules for post-course reinforcement
- Extensive library of **resources, planners and job aids** to support real-world application
- Digital materials optimized for **mobile** use and **accessibility**

Active learning approach: all digital modules are designed to get participants actively involved, not simply passively consuming information. They utilize a rich variety of media and modalities to improve learning experience and retention, including video, animation, engaging visuals, and learner interactions.



Learn more about Master Sales Leadership in [this video](#).

Why Return skills training

In the cutthroat world of sales, churn is inevitable. Supply chain disruptions, service failures, rising costs—or a host of other circumstances beyond your control—can cause your customers to look elsewhere. To make matters worse your competitors are circling, relentlessly seeking opportunities to snatch your hard-earned customers away. And—despite everyone’s best efforts—some previously loyal customers make the decision to leave.

As if finding *new* customers wasn’t hard enough, you now face the daunting prospect of trying to win back these *lost* customers too. But it’s not all doom and gloom. Your former customers are probably **your best opportunity** for hitting your sales goals.

Corporate Visions research shows that high performers significantly outperform low performers in new customer acquisition. The secret to their success is a disproportionate share of win-backs from lost customers. That’s right, **a lost customer is easier to win back** than convincing a prospect who's never worked with you to leave a competitor. But, where do you start?

What if you could:

- Identify which lost customer are worth pursuing, and which ones are a waste of your valuable time.
- Approach lost customers with a **research-backed email message** that captures their attention and opens the door to a re-engagement conversation.
- Plan and deliver a re-engagement conversation that **rekindles their interest in your solution** and that—ultimately—motivates them to return.

Why Return is a new program for sellers looking to transform their win-back success rate and unlock the revenue potential in lost customers. Welcome to your new win-back strategy:

target lost customers	<ul style="list-style-type: none">• Recognize the three main reasons customers leave and how they impact their willingness to return.• Get clarity on what caused your customers to leave.
approach lost customers	<ul style="list-style-type: none">• Learn which email message is most likely to bring your lost customer back to the table.• Bring lost customers back to the table with an email message that’s aligned to their loss reason.
re-engage lost customers	<ul style="list-style-type: none">• Re-engage your lost customer with a science-backed conversation framework.• Learn which parts of your message to sidestep to maximize the effectiveness of your win-back conversation.

Why Return course formats

Why Return is a 1-day instructor-led workshop and a self-paced digital course.

instructor-led (available now)

- In-person **or** virtual 1-day workshop
- **100% live-taught** by a Corporate Visions consultant
- **Interactive workbook** with application activities and concept summaries
- **Planner and resources** to support real-world application
- **Digital learning modules** available as optional post-workshop refresher/reinforcement (available early March)

digital self-paced / inline (available end of Q1)

- 1-week, self-paced learning program with **media-rich learn and practice modules**
- **Interactive workbook** includes activities at the end of each day of learning to apply new concepts and skills in the real world
- **Mini-booster** e-learning modules for post-course reinforcement

Active learning approach: all digital modules are designed to get sellers actively involved, not just passively consuming information. They utilize a rich variety of media and modalities to improve learning experience and retention, including videos from sales leaders, engaging visuals, and learner interactions.

Other skills training updates

Initiate Value re-naming

The course that until now was named "Initiate Value" is now named **Why Engage**.

This is because Initiate Value has expanded in scope from a single 1-day prospecting course to a full value conversation covering prospecting for either net new opportunities **or** win-backs of previously lost customers.

The Initiate Value conversation now consists of two parts (decisions): **Why Engage** and **Why Return**.

switch-off of automated reinforcement emails

At the end of March, we will be switching off the automated email sequences which are triggered on completion of an inline course or on submission of a post-workshop feedback form. These emails are not heavily used, and we have decided that a better solution is simply to make the reinforcement content available for distribution and use in whatever way best suits our customers' use cases.

Links to the Virtual Coach Guides, the Mini-Booster SCORM files, and the Expert Insights videos continue to be available in the Subscriber Portal. They can either be distributed via email or (our recommendation) simply added to the end of the course, allowing users to decide when they wish to access them.

launching from the start of Q2: AI fluency challenges for sales skills training

In both the inline and instructor-led formats, participants will have access to an end-of-course **AI-driven simulation** to apply the skills they've learned in the course. Sellers practice conducting a live conversation with a prospect or customer, and receive detailed feedback on their strengths and growth areas. The sim can be taken multiple times, to develop fluency.

As we roll out the sims, they will **replace the current Fluency Challenges**. This will yield significant advantages:

- Ability to practice a conversation an unlimited number of times, with detailed feedback and scores each time.
- A more realistic real-time dialogue experience.

We will be rolling out sims for all of the value conversations during the first half of this year.

TruVoice

TruVoice for Sales

Did you know that sellers who receive buyer feedback on at least 3 deals see [40 percent better win rates](#) YOY than those who don't? If you want to drive revenue growth, giving your sellers insight into their buyers' decisions will enable your sellers to win more.

But what if you could use buyer feedback to trigger the right skills coaching and enablement based on each seller's performance? With TruVoice, you can.

When you collect buyer feedback in TruVoice, you're measuring your sellers' performance in the key skills that influence buyer decisions.

And with **TruVoice Coach**, your sellers are prompted to review Corporate Visions skills coaching and external enablement based on their skill performance gaps as identified by their buyers.

Learn how you can use TruVoice Coach to complement your enablement strategy here: [Read more](#)

Contact your Senior Client Partner and/or Account Executive to learn more about the [TruVoice system](#).



TruVoice for Customer Success

Your customers' experiences drive their decisions. You can piece together high-level experience scores with CRM data and anecdotal reports from your service reps, but this fragmented insight doesn't tell you the whole story of why your customers are choosing not to renew. And it doesn't inform you when they're primed for upsell or expansion opportunities.

Introducing TruVoice for Customer Success! With TruVoice, you'll see continuous, detailed insight from your customers at key deciding moments in their experience journey, so you can drive retention and expansion for every account.

And, you can measure, monitor, and train your service reps in the 8 skills that drive retention and expansion. Leverage **TruVoice Coach** to serve just-in-time skills training based on each service rep's performance gaps as identified by their customers.

Learn more about TruVoice for Customer Success here: [Read More](#)

Coming soon to TruVoice: role-based dashboards

With role-based dashboards in TruVoice, you can provide continuous, relevant insights to every stakeholder in your organization.

Upon log in, your users will see a dynamic dashboard experience, built to show the most applicable insights based on their role. Users can also customize their dashboard views to further tailor their experience.

Drive the socialization of your buyer insights with everyone in your organization including:

- Sales leadership and managers
- Sales reps
- Customer success
- Executive leadership

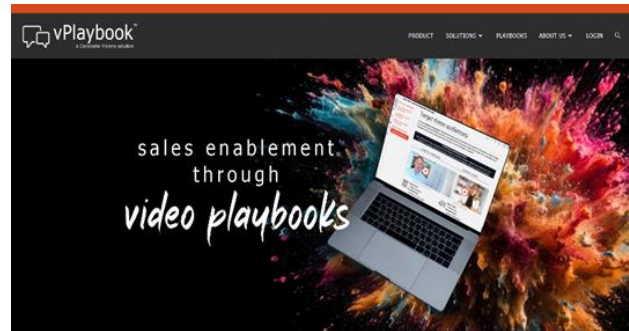
Stay tuned for more on role-based dashboards and the dynamic data you'll be able to share with your team.

vPlaybook

Purpose-built, dynamic, and interactive revenue enablement app

vPlaybook is CVI's purpose-built, dynamic, and interactive **revenue enablement app** that can be integrated into your CRM or existing platform of choice to provide situational enablement right in the flow of work and the moment of need.

Playbooks are comprehensive files containing the new messaging and training materials you've created with Corporate Visions. They are designed to serve the modern salesperson: accessible from anywhere, showing the most current content, and including engaging videos. You can add customizable, branded content and messaging to the platform at any time or place while also gaining insights into what tools, assets, and videos are being leveraged to better equip your team for success.



Check out [this video](#) to learn more about how vPlaybook supports sales enablement.

Accessible via our site or your CRM, SSO, custom portal, or SAML 2.0 capable platform, vPlaybook provides content, certification opportunities, learning journeys, analytics tracking, and conversation plan building.

vPlaybook Learning Center update

The vPlaybook Learning Center's latest releases enhance the seller's knowledge and skills with dynamic feedback, activities, and scoring methods. It serves as a dynamic space for learning and just-in-time training, allowing flexibility for manager or enablement team-owned coaching plays. Insights dashboards provide at-a-glance analytics on adoption, content updates, templating, team-specific messaging, and on-the-go enablement.

If you're not using vPlaybook yet, you can find more information [here](#).

If you're already a vPlaybook user, you can find details on the latest updates and features [here](#).

Great 8 Skills Coaching Playbook for Sales

Provide digestible, science-based training for sellers through an interactive playbook covering eight make-or-break areas of rep performance that impact win rates. Coach your sellers on providing expert insights, aligning solutions to needs, demonstrating clear differentiation, articulating meaningful value, helping

justify decisions, negotiating creatively, delivering compelling communications, and resolving concerns responsively. Whether you are currently using vPlaybook or not, make sure to connect with your Senior Client Partner and/or Account Executive to explore the available options for accessing this content!

Great 8 Skills Coaching Playbook for Customer Success

Coach your service reps through an interactive playbook covering the eight key skills that matter most to customers to drive retention and expansion. Improve the customer's experience to reduce the risk of churn and promote growth by training your service reps on managing project success, demonstrating business results, accelerating change and adoption, identifying new opportunities, delivering sustained value, managing competing interests, delivering compelling communications, and resolving concerns responsively. Whether you are currently using vPlaybook or not, make sure to connect with your Senior Client Partner and/or Account Executive to explore the available options for accessing this content!

Upcoming Release: vPlaybook mobile app

Unlock the full power of your revenue growth playbook on your iOS and Android devices with the new vPlaybook Mobile App. vPlaybook is designed to go beyond static materials, enabling your teams with rich, interactive content in an easy-to-use interface. Elevate your team's performance with improved real-time access to science-backed Messaging, Process, Leadership, and Skills Coaching content produced by Corporate Visions. The vPlaybook mobile application for iOS and Android includes viewing playbook content just in time and participating in skill certifications through the Learning Center Collections while your team is on the go. Look for the vPlaybook mobile app to release coming in February 2024!

Ongoing Change Log

You can view all [Product Updates](#) like this one in the Subscriber Portal and access a detailed [Product Change Log](#) to give you visibility into file-specific changes and recommendations.

product	update
Master Sales Leadership Instructor-led (virtual and in-person)	<p>New:</p> <ul style="list-style-type: none"> agenda, leader slides, and leader guide participant workbook coaching assessment tool and rubric coaching conversation planner and checklist coaching guides for pipeline coaching, 1:1 performance coaching, account coaching and opportunity coaching team training planner and examples co-selling planner and example <p>Provision by using your Self-Host handbook.</p> <p>English: Master Sales Leadership instructor-led is only available in English.</p>
Why Return Instructor-led (virtual and in-person)	<ul style="list-style-type: none"> New: agenda, leader slides, and leader guide + participant workbook Provision by using your Self-Host handbook. English: Why Return instructor-led is only available in English.
TruVoice for Sales	<p>New:</p> <ul style="list-style-type: none"> TruVoice Coach: Video-based skills training and resources for the “Great 8” essential sales skills
TruVoice for Customer Success	<p>New:</p> <ul style="list-style-type: none"> TruVoice insights on existing customers TruVoice Coach: video-based skills training and resources for the “Great 8” essential customer retention and expansion skills
vPlaybook	<p>Updated:</p> <ul style="list-style-type: none"> Enhancements to vPlaybook Learning Center: dynamic feedback, activities, and scoring methods <p>New:</p> <ul style="list-style-type: none"> Great 8 Skills Coaching Playbook for Sales Great 8 Skills Coaching Playbook for Customer Success