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The Executive Dilemma: Part II

How to conduct an executive-to-executive call that drives value and results for all

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Jim Bryant's Bad Day at the Office

Standing on the curb of the customer's parking lot, Jim Bryant, account manager for Tech, Inc., and his operations Vice President, Alice, struggle to process what has just happened upstairs in the client's office. This was just supposed to be a "courtesy call" on the Client's VP of Operations. How could it have gone so wrong? Jim's brain races as he tries to reconstruct the series of events.

Jim has been an account manager for Tech, Inc. for the past few years. He remembers feeling a bit uncomfortable a few months ago when he got the memo from the senior vice president of sales.

"All account managers need to be more proactive in involving the Tech, Inc. corporate VPs in their accounts. To make this easier, marketing has prepared a presentation about Tech, Inc. for the VPs to deliver to the customers."

THE MEETING SEEMED TO GET OFF TO A GOOD START.

The presentation looked very professional, with PowerPoint slides and a color 'leave-behind' for the customer. But Jim struggled to select an executive and a client to match up. He had settled on his new client, Network Way. Tech, Inc. had just closed a small contract with Network Way, but Jim suspected that there might be a lot more business there and was looking for ways to get better positioned in the organization. He had thought an executive presentation with their VP of Operations might be just the ticket to open a few more opportunities for him. He decided to take his VP of Operations, Alice, to the meeting and was very happy when Al, Operations VP for Network Way, agreed to meet with them.

The meeting seemed to get off to a good start as Jim opened, explaining that Tech, Inc. wanted to forge closer relationships with their best customers. "While we have not done a lot of business with Network Way yet," Jim explained, "the business we have done has gone very well and seemed to indicate that both of our companies might benefit from searching for additional opportunities to work together. As part of this effort, Tech, Inc. would like to take this opportunity to explain more about who we are and what we do. I would like to turn this presentation over to Alice, who will take briefly outline the history and capabilities of Tech, Inc."

As Alice began with the first few slides, Al began to fidget a bit. Soon, he interrupted Alice. "Do you mind if I interject a question or two during your presentation?"

"No problem!" Alice replied. "In fact, we find these discussions to be much more beneficial with two-way dialogue."

"Good!" Al replied. "Because I was just wondering what makes you think that I care at all about what you are presenting to me?"

Alice kept her cool and responded to Al's question. "Al, our presentation is designed to help our customers understand a bit more about Tech, Inc. We feel that knowing more about one another would help to strengthen the relationship between our two organizations."

Jim watched Al very closely during Alice's answer. Al seemed genuinely perplexed. "I am not sure who told you that we are interested in a 'relationship' with Tech, Inc. That remains to be seen. However, I do agree that it is good to know about one another. I would like to suggest that we start the discussion in a different place. Instead of telling us all about you, why don't you just take 5 minutes away from the PowerPoint and tell me what you know about my organization. I'll time you. GO!"

Alice, now a bit on-the-spot, began to explain a bit more about her background and the work she had done with organizations very much like Network Way. "I don't mean to interrupt you, Alice," Jim said, "but I was interested in hearing what you know about us, not companies that you think are like us."

Jim jumped in and started describing the small project that Tech, Inc. had recently completed with Network Way.

"With all due respect Jim", Al said impatiently, "you are still telling me about your organization and what YOU can do. I'll tell you what. Let's table this discussion for now. Come back when you know a little more about Network Way. Thanks for coming in."

Back curbside, Jim knows that he has to debrief the outcome with Alice. He wonders if he will be blamed and begins to feel defensive about the fact that he had been told he MUST take an Executive with him to a client meeting. Before he can say, "I was afraid that this kind of thing would happen!" Alice makes a stunning observation.

"That was the worst and best meeting I have been to in a long time!" Jim feels pretty clear why it was the worst meeting, but is less sure why it was the best.

Noticing Jim's confused look, Alice explains that in her view, Al had just done them a huge favor. "We have been doing these presentations all over the country. We just had a customer tell us

"YOU ARE STILL TELLING ME ABOUT YOUR ORGANIZATION AND WHAT YOU CAN DO."

that they are not working the way we hoped they would. We need to step back and look at this approach and see if we should continue. We certainly do not want to waste time, money, productivity and customer good will if these presentations aren't helping to drum up additional business!"

If Only Jim Had Prepared to Succeed

While we have changed the names of the companies and people, we heard this story from an executive like Alice. We have witnessed this pattern in many organizations over the last 20 years. Executives nobly want to be more involved with the customers. Many organizations choose executive-led "Capabilities Presentations" to pry open doors at executive levels in customer organizations. Now we like a good capabilities presentation as well as the next person. They play an important role in the sales cycle. However, as a tool for positioning high and wide in an organization, they often fall short of the intended outcome. As a rule, customers don't lose sleep at night worrying about what is happening at your organization. They lose sleep worrying about what is happening in their organization.

We offer a different way to host an executive conversation. While there must be as many reasons to call on executives as there are executives, we concentrate on one approach, executive interviews, that we briefly highlighted in our previous *Velocity®* article, *The Executive Dilemma*[1]. These interviews are not sales calls. Rather, they are business calls where the prime agenda is to understand the impact of industry trends on the customer's priorities. These interviews have greatest impact when they are conducted outside of the formal buying process. And yes, with proper preparation and execution you can often make the meeting even more productive by engaging one of your own organization's executives to help conduct this interview.

Preparation for an executive interview is key to the success of the meeting. In *The Executive Dilemma*, we discussed how to prepare both your executives and your customers' executives for the meeting. In case you missed that article, here is a list of key points:

- You must identify a business reason for the meeting to gain your customer executive's attention and to get agreement to meet. The business payoff must be about the customer and should answer the question, "What's in it for the customer to spend an hour with you?"
- Remember that this is not a sales call, so discussing your product, capabilities, current proposal, etc. is not the purpose of this meeting.

- You should only call on those functions of your customer's business that would be impacted in some way, should your companies do business in the future.

So, after you have chosen the right people and gained the appointment, how do you conduct a meeting that is not a sales call? How do you get your customer's executives to discuss the priorities of their business, especially when they are accustomed to having salespeople make only "sales calls"? To answer these questions, let's rewind the tape on Alice and Jim's executive call from the beginning of this article and "watch it" as it may play out if they have the chance to do it over.

The "Do Over"—Jim's "Right Way" Executive Interview

Jim and Alice show up at Network Way well prepared for their meeting with Al. Jim chose Alice to come to Network Way since she and Al have similar roles. Jim also knows from his work with Network Way that they are just implementing a new Enterprise Resource Planning system in the operations division. In a prior role, Alice was the project lead for a major ERP system implementation at a leading IT company. While Tech only tangentially deals with ERP system implementation, Jim knows that Al will be interested in any insider tips Alice can provide about the process. Jim knows that being able to share this sort of information and expertise does wonders for opening up a business conversation with a client and he wants to be known as someone who brings great resources to the table for clients, even when it does not lead directly to a sale.

Outside Al's office, Jim checks in with Cindy, Al's assistant.

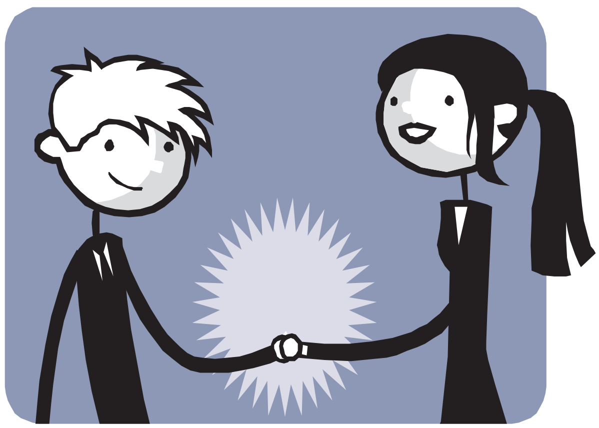
"Hi Cindy, I'm Jim Bryant from Tech, Inc."

"Jim—nice to meet you!"

"Yes, it's good to put a name with a face," Jim answers. "Hey, I have a quick question for you. Do you know if Al received the one-page agenda I emailed over after we talked last week?"

"Yes, I put it on his desk personally," Cindy says.

"Great. Thanks for all of your help setting this up. As we do business with Network Way, I think Al's operations area is going to really be affected by our work. So it's really important that we understand his perspective on the business so that we design our work plan with that in mind."



"THANK GOODNESS THIS IS NOT A SALES CALL."

"No problem," Cindy replies. "When I mentioned that reason for the meeting to Al, his eyes got big. I think he's looking forward to meeting with you, though I do have to tell you that he has a hard stop in an hour."

"That's OK," Jim says. "We'll keep the meeting focused."

Five minutes later, Al's door opens and out he walks. After introductions, the three of them sit down at a round, wooden table in the corner of his office flanked by dry erase boards and a flipchart.

"Well, I'm not used to being called on by people from your industry," Al starts. "What can I do for you?"

Jim slides a one-page agenda across the table. Verbally, he summarizes the key points concisely laid out under the headings **Purpose, Process** and **Payoff**.

"I think Cindy may have given you this agenda. Here's why we have come to visit you today. You know that we have just begun doing business with Network Way and we are currently implementing our first small project. Now it's still under evaluation, so we're not sure where the IT folks will want to take it, but if it does grow the one thing we know is that it will profoundly affect Operations. And since you are a primary stakeholder of that group, we thought it would be useful to really understand your unique perspective on the priorities for Operations. This will help us to take your interests into account as we work with IT so that your needs and priorities get addressed as we design and roll out solutions. If it's OK with you, we'll do this by asking you a few questions about the business. We'll be sure to identify clear next steps that will come out of our meeting. How does that sound?"

"It sounds fine to me," Al replies, glancing down at Alice's business card. "But help me understand your role today, Alice. I see you're an ops person as well, so it's unusual for you to be on a sales call."

"Well, thank goodness this isn't a sales call," Alice laughs. "We really see this as a business interview with an important client. But to answer your question directly, I'm also here because we hear you're doing an ERP implementation. I was instrumental in doing one of those projects in a past life and thought I might be able to both share some experience with you and perhaps ask a few questions that only we ops types would think to ask."

"OK, where do we begin?" Al says, settling back into his chair.

"Let's start with what's happening in your industry and how it's affecting your particular operations group," Jim says. He continues to list off three trends that Alice and he had identified as important industry drivers. Quickly, Al dives into the topic, showing Alice and Jim which of these trends is most important in his group and why. Alice chips in astute questions that only an operations professional could think of on the fly. After a few minutes of this, Jim redirects the conversation into a slightly different direction.

"OK Al, that helps us get a summary of where things stand for your group. Now I have a few questions about where you are taking the operations group at Network Way. Do you mind if I ask those now?"

"Fire away," Al says.

"Imagine it is eighteen months from now and your group has performed at a very high level. You are very satisfied with your accomplishments as a group. Assuming that you have reached that level of performance, what would have happened to make you so happy?"

Al sits back a little and looks up at the ceiling, trying to put himself right into that future scenario.

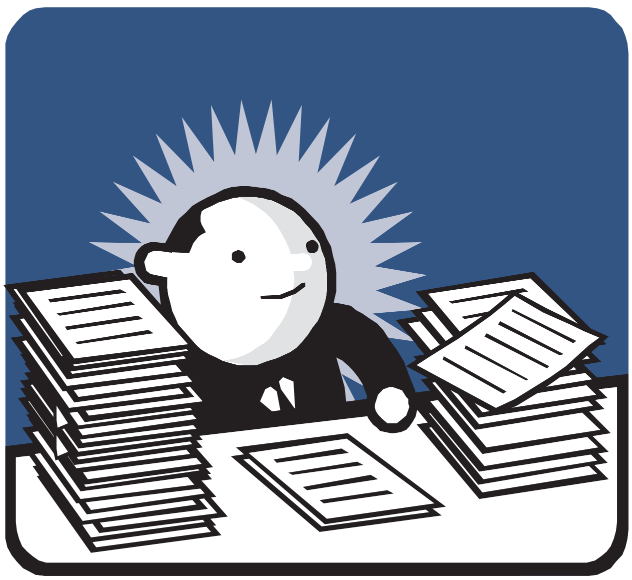
"Well, I think three things would have to happen for me to be that happy." Al rattles off three accomplishments, all of which are fairly typical for operations leaders. Alice and Jim ask him clarifying questions, trying to get him to make these items as quantifiable as possible.

"OK," Jim continues after checking on the accuracy of his notes. "I hear these three goals. I know they're all important, but if you had to rank-order them in terms of importance, how would they fall?"

Al ponders for a moment. "Actually, the last one I mentioned is most important, followed by the first one and then the second." Jim smiles, knowing that clients rarely talk about their goals in rank order.

"For the sake of time, I'd like to start with the most important goal and ask you a follow-up question. What are the handful of things that absolutely must go right if you are to achieve that goal." Jim is asking about Critical Success Factors, the means clients use to achieve their goals.

Al again stares up at the ceiling briefly, then starts to list critical activities. He is warming to the task now, and occasionally jots a note as he talks, perhaps capturing a new insight as he goes. Jim takes notes carefully. Alice smiles, both because she identifies with Al and because she is enjoying the call more than she thought possible.



THEY HAD LEARNED A LOT ABOUT AL'S PERSPECTIVE ON NETWORK WAY'S BUSINESS PRIORITIES.

Before anyone (including Al) knows it, 45 minutes have passed. Aware of the time and his commitment to stick to it, Jim starts to move the meeting to the next phase.

"So Al, let us summarize what we've heard today." He reads back from his notes the key trends affecting Network Way's operations group and the rank-ordered goals Al has for the next eighteen months. They only had time to unpack Critical Success Factors for the top two goals, but Jim knows that this is not likely to be the last interaction they have with Al.

"It sounds to me like you got it pretty well," Al comments. "What are the next steps?"

"Well, as we said at the beginning of our meeting, we're meeting with executives like you to understand the different points of view of those affected by our sorts of solutions. If you'd like, I would be happy to send you a brief written summary of this meeting." Al nods. "I'm also curious if there is anyone else in the organization you think we should meet with."

"Yes, I really think you should meet with Jan Kelly, who runs our marketing department. Your projects will inevitably affect how we target our products and services to our customer base and I think she would have good input for you."

"Would you mind helping us with the introduction?" Jim asks.

"That's no problem. Jan and I serve on the executive team and we go way back. Give me a couple of days, then check back with Cindy to see whether I've taken care of it." Al pauses. "Now Alice, I'm afraid I'm out of time today, but I really would like to get together on this ERP implementation. Could we have lunch sometime or do you need a minder?" Al winks at Jim, enjoying the sales vs. operations banter.

"No, we let her out on her own all of the time," Jim laughs.

"I'll have my admin set it up with Cindy," Alice joins in.

"Besides those points," Jim continues, "we plan to complete our executive interviews over the next three weeks. We may try to get the entire group of Network Way executives together to review our findings and to deal with any differences in perspectives.

The "Short Course" on Hosting an Executive Interview

If you are the one running the call, it helps if you have a template—a pattern for the process of the call. This will keep you on track and help you accomplish the objectives of the call. After all, you will probably have a limited amount of time with this executive, and you don't want to waste it. The call should have four phases: 1) the opening, 2) the body of the call, 3) identifying 'next steps' and 4) ending the call / follow-up.

1. Opening the Call

- Explain the business reason behind your interest in meeting the executive.
- Put the client at ease with a clear agenda for your time. For example:
  - **Purpose:** To gain your unique perspective on the business at Network Way.
  - **Process:** Interview with focus on your key goals and priorities.
  - **Payoff:** We will use your interests to shape any work done between our companies.
- Ask for any input on the agenda.
- Ask permission to begin.

2. The Body of the Call

- Ask the executive to comment on how recent specific trends have affected his company and area of responsibility. NOTE: Be prepared with the general industry trends before the meeting!
- Ask the executive to paint a picture of success over the next 12-18 months. Listen for specific, measurable goals. Clarify them if they are ambiguous.
- Ask the executive to prioritize the goals.
- In order of priority, ask the executive to describe what must go right for each goal to be accomplished.
- Summarize and check for understanding.

3. Identifying Next Steps

- Remind the executive about how you plan to use the information.
- Ask for introductions to other executives who would be profoundly impacted by your solutions.
- Ask for permission to summarize your notes from the meeting and have access to the executive in the future as you need more information.

4. Ending the Meeting and Following Up

You have done so much well at this point, don't blow it now!

- Keep your eye on the time. End on time or early, only extending time by the client's invitation.
- Follow up flawlessly. Complete actions on time or early with clear communication. Countless executives tell us that they evaluate a supplier partly based on how it keeps promises about follow-up.

Regardless, how would you like us to keep you informed about the progress of our work?"

"I definitely want to stay in the loop," Al says. "If you don't get us all together, I'd like to meet with you again before you put together any proposals for IT so that I can hear what you found out. And if you need any more input, feel free to call Cindy to set up a phone call or quick meeting."

After thanking Al, Jim and Alice leave the office right on time, passing Al's next appointment in his office waiting area. Before going their separate ways, they clearly map out follow-up responsibilities and timelines. They know that they have made a potential ally out of Al—now they have to keep delivering on their promises to cement the relationship.

Standing on the curb, Jim thanks Alice for her contribution to the meeting. No, they hadn't spent 45 minutes sharing ERP war stories. But they had learned a lot about Al's perspective on Network Way's business priorities. That information would be crucial to shaping a winning proposal based on business value instead of simply product value. Al had gained confidence in Tech's team and approach and had added Alice to his value-adding network. Alice takes real-world market insight back to her "day job" as operations executive.

As they head to their respective cars, Alice looks back over her shoulder.

"Hey Jim," she calls. "That was the best meeting I've been to in a long time!"

[1] The Executive Dilemma, *Ted Harro and Jane Blinde*, Velocity® Q2 2005.

Noonday Ventures (www.noondayventures.com) offers real-time performance coaching to leaders and teams who want to bridge the gap with key customers. You can reach Ted Harro at ted.harro@noondayventures.com or 847-202-4955 and Jane Blinde at jane.blinde@noondayventures.com or 407-433-0614.