



The Journey to World Class Briefings:

Developing Your Discussion Leaders

Some of the Most High-stakes Presentations Take Place in Briefing Centers.

It's likely that your company has made a significant capital investment in developing a Briefing Center that strongly reflects your corporate brand and culture. And, you've put processes in place to plan, deliver, and measure an impressive and persuasive customer experience.

But when the Moment of Truth™ arrives, after your customers have settled comfortably into their chairs, it's the people in the briefing room who must bring your brand to life.

What is the Cost of Failure in That Moment?

Your discussion leaders are your most strategic asset and best competitive differentiator. Your decision to invest in developing these subject matter experts can make or break the outcome of your briefings.

We invite you to explore how three of our clients implemented a discussion leader engagement strategy. Then, review the steps you can take to start on your own path to world-class briefings.

When your Moment of Truth™ arrives, we want you to be confident that your customers will understand your key messages, see the value in your solutions, and view you as a trusted partner.

Moment of Truth Readiness[®]

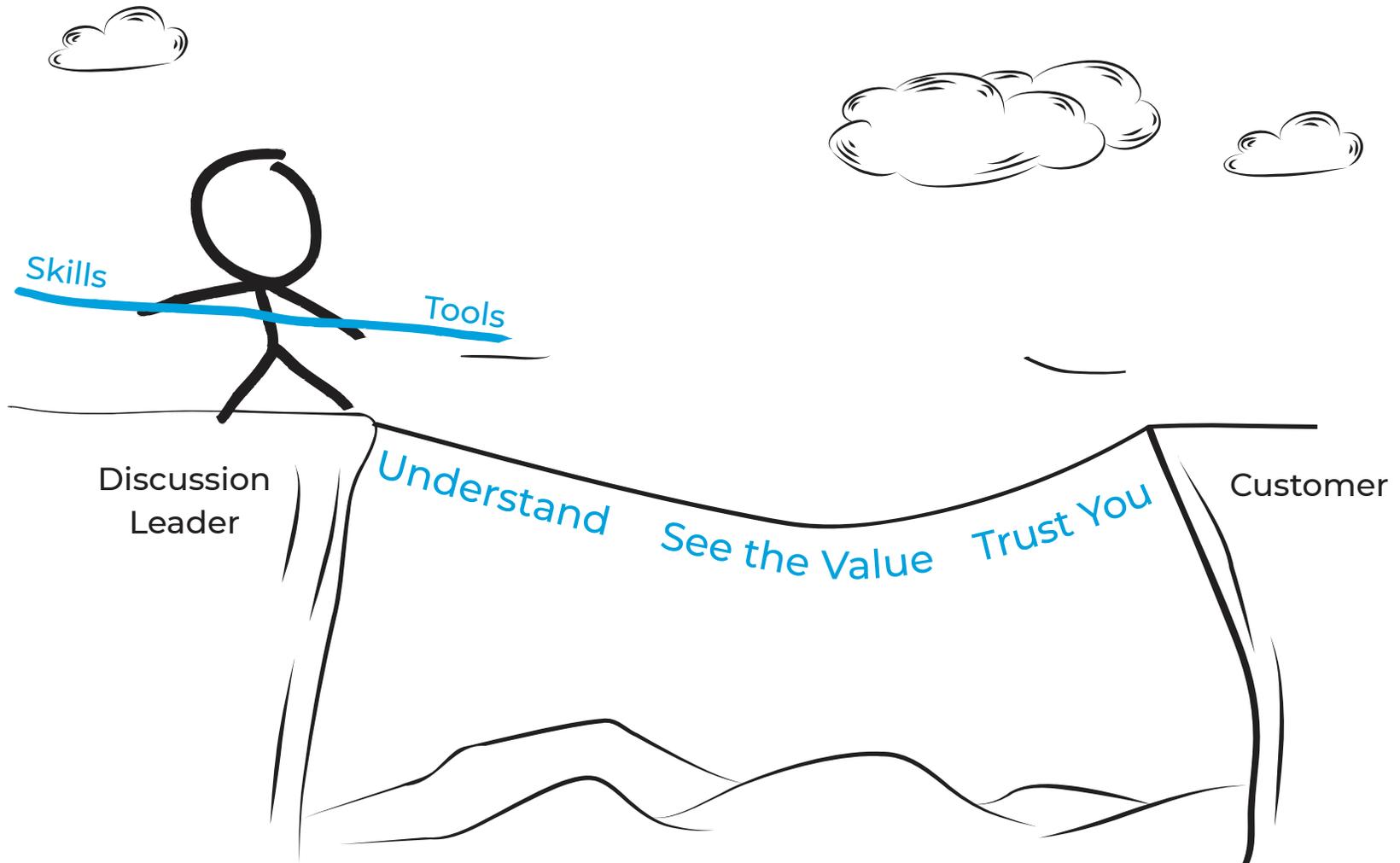


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Briefing Center Success Stories

BMC Software

Brocade

IBM



BMC serves tens of thousands of IT organizations around the world, from small and mid-market businesses to the Global 100. One hundred percent of the Forbes Global 100 and 82% of Fortune 500 companies rely on BMC Software for IT management solutions.

The BMC Software Executive Briefing Program was awarded Briefing Program of the Year in 2012 (for the third time), as well as awarded “World Class” for the 11th consecutive year by the Association of Briefing Program Managers.

The Challenge

Key subject matter expert presenters needed to be more polished and effective in their communications. “They were the face of BMC and they needed to be able to comfortably and confidently articulate our solutions”, says Karen Bintz, Senior Director, Customer Experience.

The Stakes

“We don’t get a second chance to make a first impression. Our discussion leaders have one chance to get technical topics across to both technical and non-technical buyers.”

The Journey

At her first ABPM conference, Karen reached out to some of the biggest players in the industry to see how they were addressing this challenge in their programs. “I heard over and over about Mandel. So I talked with them. They asked if they could come out and spend a half day with us understanding BMC. They listened to us and customized a program to exactly fit our needs.”

The Results

“Talking about the customer before we talk about ourselves was a mindset change. Our SMEs use the Mandel Blueprint® framework, so there’s consistency in the presentations. And, that makes it easier for the customer to follow. The biggest impact that we’ve seen is in the increased confidence level of our customers and prospects in BMC solutions. It’s the discussion leaders that move that needle during the briefing day.”

Watch a video of how Mandel partnered with BMC’s Briefing Program in our video gallery: www.mandel.com

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Mandel has influenced more than just the EBC. What started out as a briefing center training offering has expanded company wide. Everyone here has a lot on their plates and the Mandel tools give us a common, concise way to communicate. It’s simple. It’s easy to follow. Our executives expect us to SCIPAB® our presentations and emails. It saves time. It’s become a mantra-‘SCI-PAB it for me.’

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BROCADE

Founded in 1995, Brocade is an industry leader in providing reliable, high-performance network solutions that help the world's leading organizations transition smoothly to a virtualized world. Brocade combines a proven track record of expertise, innovation, and new technology development with open standards leadership and strategic partnerships with the world's leading IT companies.

The Challenge

The company had two conference rooms and no strategic briefing program or processes. "Our goal was to build a branded venue and deliver customer experiences that would be highly valued by the sales organization to influence and drive business," says Michelle Limbocker, Director. "We had a diverse group of presenters from global backgrounds who lacked confidence in presenting to customers."

The Stakes

The CEO issued a directive: "If you're not comfortable speaking with customers, you'd better get comfortable. EBC stands for EveryBody Closes!"

The Journey

Even as she was interviewing for the position to build and lead this new briefing program, Michelle realized she would need to implement a training program. "I'd partnered with Mandel in the past three briefing programs I built. It moved the needle in up-leveling people's skills—and there was a direct correlation to our briefing results."

The Results

Michelle championed the training across the business, helping her counterparts in other departments see the value in raising the customer communication skills of their people. She began hosting Mandel training programs in the EBC. "Sales sees the value in the training because it influences so many customer touch points outside the EBC, as well. When the Mandel methodology is used company-wide, it helps our discussion leaders to be more comfortable presenting in the EBC. That helps our customers better hear our message and impacts business results across the board."

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We're only as good as our subject matter experts. Mandel has a special insight and expertise in briefing programs. They're very focused on preparing for that customer engagement in the Center. They know what I'm trying to accomplish in my journey and roadmap for the program.

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IBM, a Fortune 20 company, is a leader in almost every market in which it competes. Its information technology, business services, and software units are now among the largest in the world, serving customers globally across most industries.

The Challenge

The IBM Software Group Briefing Centers rely on the exceptional technical talent found in their Development Labs. These innovators have one-of-a-kind technical subject matter expertise. But, it's not always matched with the skills necessary to communicate that knowledge to Line of Business buyers who want to understand the business value of the solutions.

The Stakes

"We needed our SMEs to feel comfortable stepping away from the computer, leaving the slides behind, using a whiteboard, and having a conversation with our customers," says Karen Fonseca, Worldwide Software Group Executive Briefing Centers Business Unit Leader.

The Journey

"Mandel met with us and listened to our vision for our discussion leaders. They really took time to understand our briefing business. They talked with us not just about training our discussion leaders, but also about recruiting, retaining, and rewarding them. They helped us think about it more as a strategy—not just about getting a guy out of the lab to speak."

The Results

"It's really turned up the listening and customization in our briefings. We have a higher level of consistency in message and delivery. Our SMEs are thinking and speaking more broadly and helping customers understand 'why should I care'. And we have a common framework for coaching them, even on the prep calls. They're doing a much better job of listening to our clients."

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Our discussion leaders feel like they have an external partner who cares about their success. At the end of every Mandel class, the trainer gives them their phone number to call anytime for help on a presentation.

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Mandel really listened to us and partnered with us to customize the workshop. They kept coming back saying, 'Does this meet your needs?'

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What Is the Cost of Failure to Your Organization?

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Your discussion leaders represent your brand. They need to personify the professionalism, customer focus, quality, responsiveness, and integrity of your brand. In other words, they need to represent the value customers can expect to receive when doing business with you.

These qualities can be difficult to measure. But, when you go to the mat for budget, you need to be able to estimate the impact of your investment. In addition to quantity metrics, it's important to emphasize quality.

Your company has made a significant investment in the Briefing Center and in pursuing the customer relationship before your customer ever sets foot in the Center. And, there's likely a lot of long-term revenue at stake should the customer choose to do business with you.

Given What's at Stake, Can You Risk Putting A Discussion Leader Who's Not at Their Best in Front of Your Client?

Not likely—which is why developing an effective discussion leader strategy is critical to briefing center success.

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I'm not going to put all this investment into a briefing program then, at the last minute, just throw someone in front of the customer. They have to be trained. They have to be certified. They have to earn the privilege.

- VP Sales, High Tech Firm

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Developing a Discussion Leader Strategy

What Does it Take to be an Effective Discussion Leader?

The PowerPoint deck is not the presentation and dialogue trumps monologue. In addition to their technical proficiency, discussion leaders need the business acumen to carry on a dialog with economic buyers and business decision makers about business trends.

Your discussion leaders must understand the special needs of, and opportunities inherent in, briefings. They must possess the skills to deliver a message effectively and conversationally, and explicitly exhibit behaviors that reinforce your brand values.

When they do these things well, the magic happens. Customers are more likely to buy, buy more and buy sooner.

What Does it Take to Develop Effective Discussion Leaders?

How can you develop executives and subject matter experts (SMEs) into brand representatives who know how to effectively tell your corporate story in a customer-centric way that differentiates your company from the competition?

A discussion leader engagement strategy guides you in making the right investments in the right people—from speaker identification to training, feedback, coaching, reward, and recognition.

Your investment in your discussion leaders can make all the difference to the customer experience.

Roadblocks to Deploying a Robust Discussion Leader Strategy

In our experience, these are the three most common roadblocks to deploying a robust discussion leader engagement strategy:

- Lack of funding
- Limited executive support
- Resistance from Subject Matter Experts (SMEs)

“It’s not my day job.” | “I’m not paid to talk to customers.” | “I don’t feel confident speaking in front of people.”

You can overcome these roadblocks and Mandel can help you. Next, we’ll take a look at how to use data to support your investment case and position discussion leader training for success.

How to Overcome the Roadblocks

The Association of Briefing Program Managers (ABPM) has collected two decades of survey data measuring the impact of briefings on business results. With ABPM's permission, Mandel has developed a whitepaper that integrates these data points into language you can use to help you make the case for additional investment in your program.

Download the whitepaper here: Conversation Starters from the 2013 ABPM Multi-Client Study Data. (<http://www.mandel.com/whitepapers/abpm>)

Using the Mandel Personal Communications Framework SCIPAB® model, the whitepaper helps you get right to the point in making a logical and actionable recommendation that is supported by the results it will produce.

Using this Mandel Moment of Truth® Communications Framework, we've helped numerous clients make the business case for investment. At the highest level, it looks like this:

Situation: Briefings are high-risk, high-investment opportunities.

Complication: We have one chance to get our message across.

Implication: If we miss the mark, we risk damaging the relationship and losing the sale.

Position: We need to help our presenters be more effective in telling the story of why the customer should partner with us.

Action: I'm asking for a training budget to do that.

Benefit: We have the opportunity to increase our impact on business results.

Whether you're communicating with your marketing up-line, sales leadership, or product management, you have a compelling story to tell. We know Briefing Programs and we're committed to helping you build your case and tell your story with confidence! If you would like assistance, please give us a call at **831.475.8202**.



Positioning Your Training for Success

Senior briefing managers tell us they've found ways to leverage their training investment for a broader business impact:

- Invite subject matter experts to a training class as part of a “high potential” development opportunity.
- Hold a pilot class for your most senior business leaders. They'll spread the word and become your strongest champions.
- Help your discussion leaders see WIIFM (What's in it for me!) to improve their skills—they'll become rock stars!
- Ask your business units to nominate a few key people to participate in the training.
- Think outside the silo. Collaborate with your peer leadership in Product Management, Engineering, and Sales to help them see the broader benefits for their associates to develop their skills.
- Share a budget with HR or your Learning Organization to fit training into overall skills development and employee retention strategies.
- Socialize success stories and leverage sound bites from successful customer engagements, where trained discussion leaders made the difference.
- Segment customer feedback scores for trained and “untrained” presenters and use the gap to tell the story about how important customers rate the presenter's capability to deliver the message.

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We position the classes with our SMEs as ‘you have talent— you have potential— we want to help you develop that’.

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- Karen Fonseca,
IBM SWG EBC Business
Unit Leader

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Step-by-step Guide to Implementing Your Strategy

For more than 20 years, Mandel has been helping Briefing Center managers develop powerful and effective discussion leaders. Based on our experience, we've developed a step-by-step methodology for building moment of truth ready discussion leaders.

Build Moment of Truth™ Ready Discussion Leaders

Step 1: Identify prospective presenters.

Step 2: Give them an orientation to what a briefing is and how it can bring your corporate brand to life.

Step 3: Let them observe a briefing.

Step 4: Ask them to self-assess their readiness to engage with customers.

Step 5: Based on that assessment, identify the right training and apprenticeship experience to prepare them for their first briefing.

Step 6: Provide timely customer feedback, both quantitative and qualitative, on their briefing participation. Coach the gap..

Step 7: Reward and recognize the right behavior.

Step 8: Sit down for an annual checkpoint discussion with each of your presenters to consider their individual goals and how you can support them with additional training and experience.

Providing your SMEs and executives with reinforcing and constructive customer feedback enhances the strategic value of your Briefing Program. Mandel can help you increase your confidence in delivering this kind of feedback effectively.

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Our discussion leaders are one of our greatest strategic assets ... they're what truly differentiate us from the competition.

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- EBC Manager

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The Mandel Communications Discussion Leader Development Roadmap

The Mandel Communications Discussion Leader Development Roadmap

Your subject matter experts need to be able to organize compelling customer-centric presentations, deliver them with confidence, effectively support them with visuals, and diplomatically handle tough questions and objections.

At Mandel Communications, we've created a roadmap to help you develop your Discussion Leaders.

The Fundamentals

All of your presenters will benefit from completing Mandel's training program, **Think and Speak for Results in the Briefing Center™**. They'll learn to customize their presentations for the customer, engage in effective interaction, use visual support appropriately, and deliver a message in a way that builds trust.

Advanced Skills

The top 20% of your speaker pool—your “go-to” presenters—will want to up-level their skills to become agile and flexible Discussion Leaders. The Mandel program, **Conversation Skills for Discussion Leaders**, will teach them how to rely less on prepared slides and engage more conversationally. They'll master the art of asking great questions and also learn how to use a whiteboard effectively during those conversations.

Mastery Level

Your most senior executives—those who possess natural charisma, love talking with customers, have extraordinary business acumen, and are great partners and advocates for your program—will benefit from individualized **Executive Coaching**.



Additional Resources to Help You on Your Journey

At Mandel, we have intimate knowledge of and experience working with the briefing programs of some of the largest, most successful companies in the world.

In addition to the specialized Briefing Program training courses we offer, we've made learning resources available on our website to help you maximize the value of your Briefing Center Programs. You can download any of these documents by clicking on the links below or visiting:

<http://www.mandel.com/resources/whitepapers/>



Maximizing Your Positive Briefing Results



Mandel Discussion Leader Self-Assessment



Best Practices To Win High-Stakes Finalist Presentations



Best Practices For Using Telepresence In Customer Briefings



How To Use Presentation Software Effectively



How To Make Winning Team Sales Presentations

About Mandel Communications

When the Stakes are High, the Quality of What You Say and How You Say it Can Make All the Difference.

Every day, organizations turn the communication skills of their people into a strong competitive advantage using Mandel's training, skills-building practice, and expert feedback.

Working with Mandel, You Will Gain a Unique Combination of Demonstrable Benefits:

- **Rapid skill improvements make a winning difference.** Mandel-trained professionals, managers, and executives can quickly create messages and content that are listener-centric, clear, and compelling. Equally important, the personal "presence" of your trained communicators will become increasingly authentic, confident, credible, and interactive.
- **Job performance improves whenever masterful spoken communication skills are a key requirement for business success.** We tailor our solutions and training programs to achieve your organization's unique business goals. Our skills-building processes and tools will focus directly on producing the on-the-job performance and business results you seek.
- **Skill-building that scales globally.** To align with your global activities, Mandel's expert trainers and coaches are located throughout Europe, AsiaPac, India, and North America. We can help you build communication skills in eleven different languages.
- **Face-to-face and virtual delivery options to meet your needs.** Clients consistently evaluate Mandel's face-to-face group training workshops and coaching services as world-class in all respects. And, increasingly, they cite Mandel's virtual training capabilities as a unique differentiator when face-to-face training is not possible or ideal. We deliver training virtually and also train professionals to better communicate using virtual tools, such as web meeting software, collaboration platforms, and teleconferencing tools.

Could your business benefit from a significant improvement in spoken communication results? Contact us to discuss how your organization can achieve the benefits mentioned above.

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There's no stronger investment I make with any external vendor than there is with Mandel...

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- Jason Andrew
VP-Sales, BMC Software

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