Conducting a Remote Needs Analysis

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Agenda

- Why Remote Needs Analysis?
- Remote Meeting Guidelines
- Additional Tips

Why Remote?

Reason for Remote Needs Analysis

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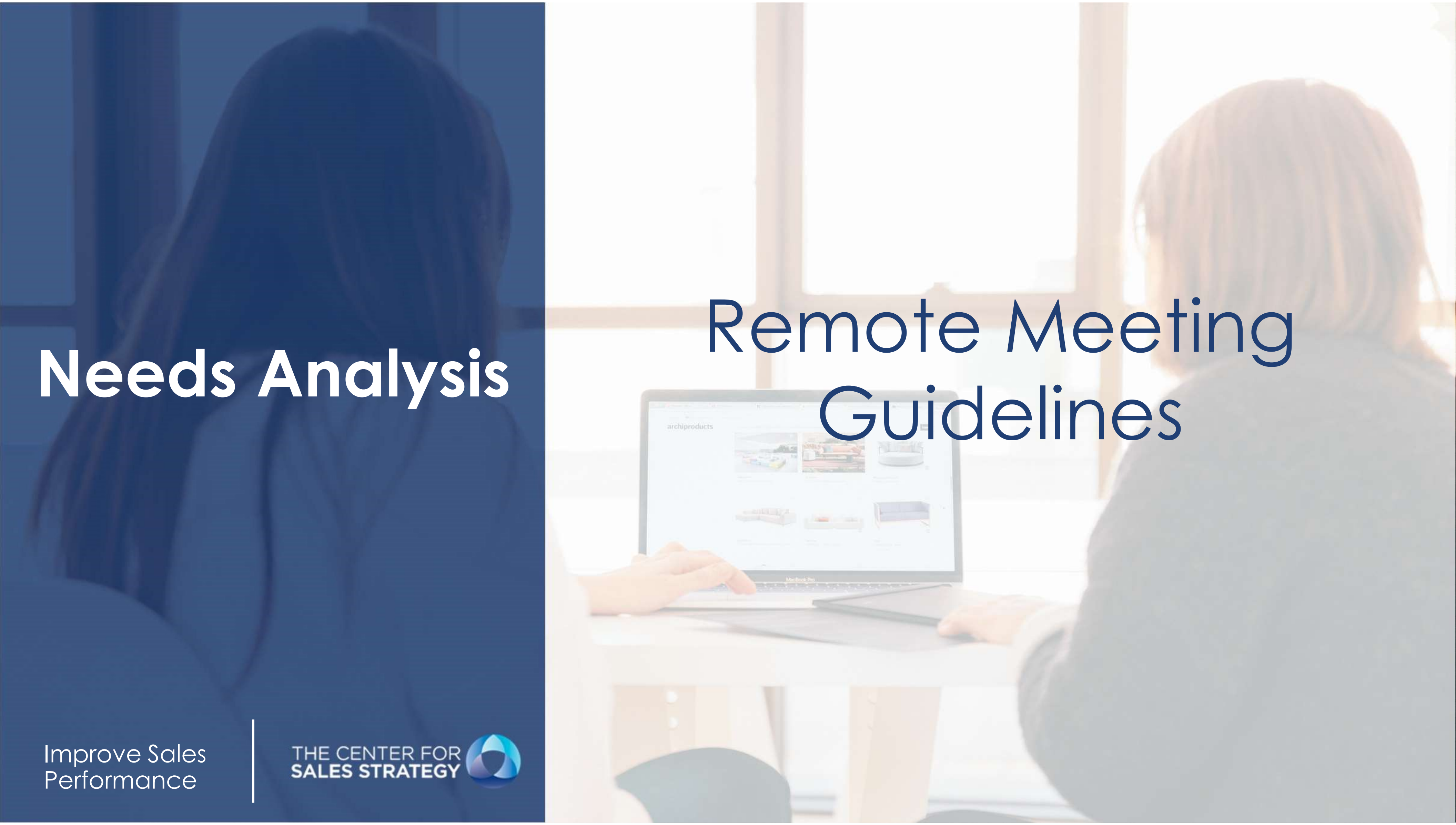
Reasons for Remote Needs Analysis

- Remote is becoming more common
  - Face-to-face will still happen, but will come further down the process
- Businesses will be taking time to get back to 2019 levels
  - Less people available, busier than they have ever been
- Meeting with a stranger will be harder to accommodate
- Business owners more apt to take a call or shared screen meeting
- Efficiency

Successful Remote Meetings

- If you are going to do remote calls – do it right!
- Accept > Adapt > Accelerate
- Data shows that a shared screen with your camera on yields better results
- Consider these best practices for a successful remote meeting

- **REMEMBER:** The goal is to conduct a successful Needs Analysis to understand the Desired Business Results



Needs Analysis

Remote Meeting Guidelines

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Guideline One

Send an email when the meeting is set

- Meeting app invite
  - Time
  - Attendees
  - Link to shared screen meeting
  - Agenda

Sample Email

Send

To

Cc

Subject

Hi Amanda, I'm looking forward to our call tomorrow. We will be using the "Teams" meeting app for our call. If you haven't used Teams before, you might be prompted to download the app before our call. You'll see a call number and link in the invite notes. I will share my screen to show relevant information and to collaborate on our notes and next steps.

I will have my camera on - this is very casual - but I don't expect you to share yours unless you want to.

Guideline Two

Join the remote meeting

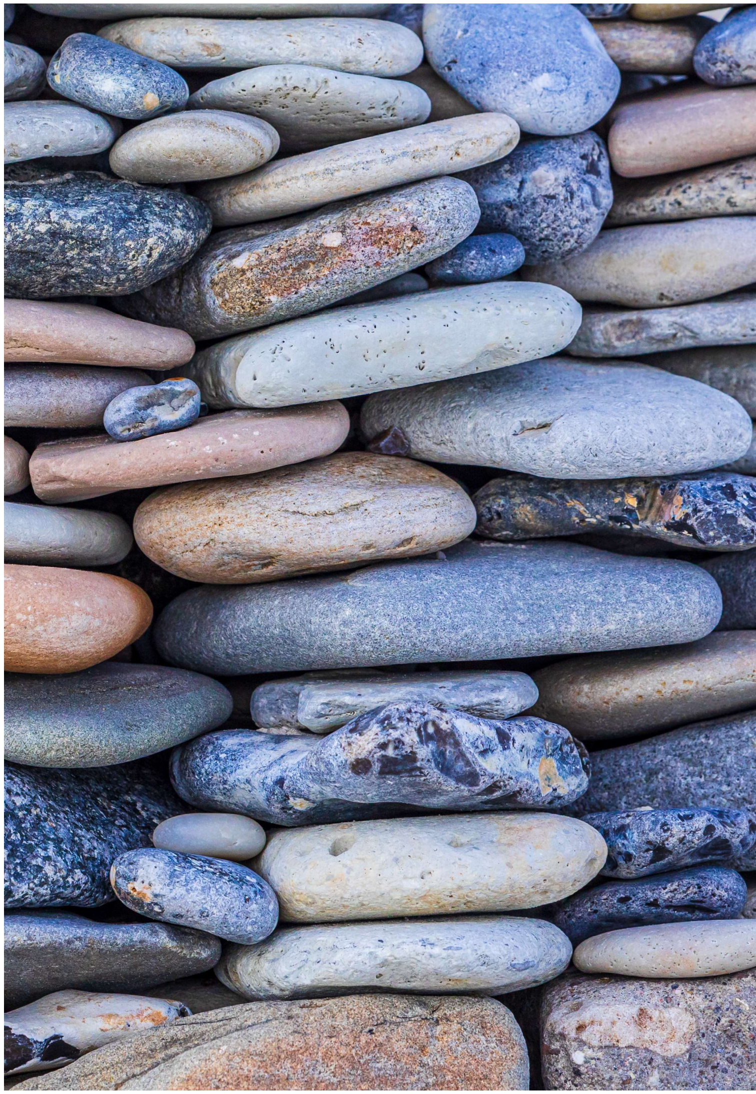
- **Five minutes prior to your appointment**
  - Enable your camera
  - Join the meeting via your shared screen app

- It is awkward if the prospect gets there first
  - This may be the very first time they are using the app

Guideline Three

Begin the meeting by building rapport

- Camera on
- Open with your agenda
- Restate the purpose of the meeting
    - What you can do for the prospect
    - Ask questions about their business
- Begin with the end in mind



Guideline Four

Share on screen what you would in person

- We recommend a 3-5 slide PPT deck
  - General overview of capabilities
  - Problems that you solve
  - Share an insight into their business

Guideline Five

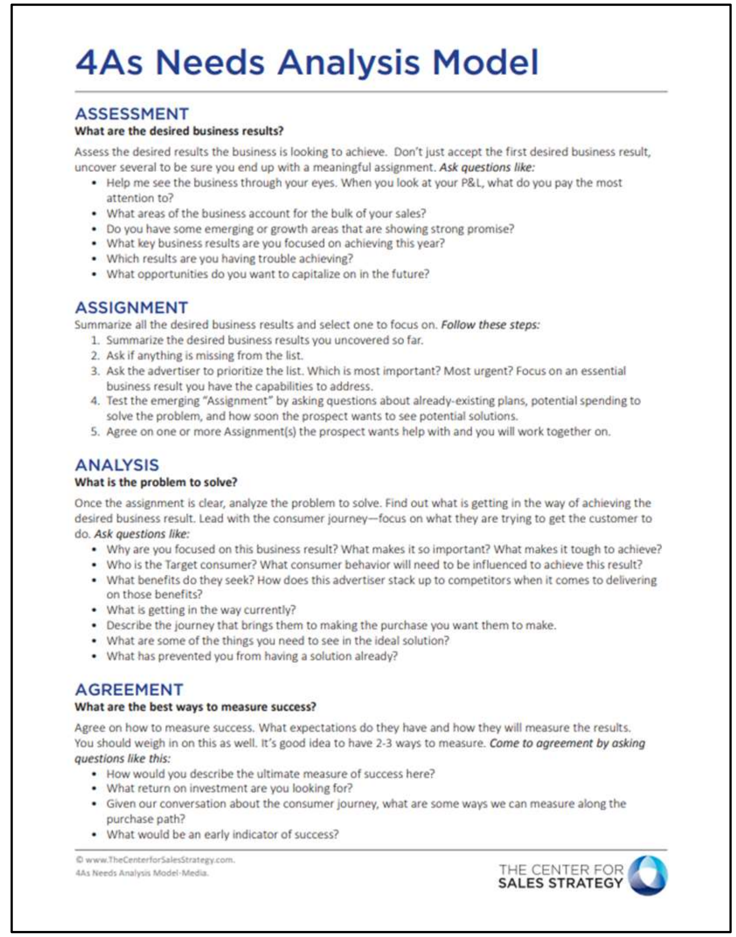
Share your Word document and take notes

- It is important that they see the notes
- Ensure you're capturing everything correctly
- Ask whether you have missed anything important
- Add your logo for a nice touch

Guideline Six

Ask questions as you move through the 4As Needs Analysis

- Pause and capture the answers
- Occasionally ask the prospect whether your notes accurately describe what you are discussing



4As Needs Analysis Model

ASSESSMENT

What are the desired business results?

Assess the desired results the business is looking to achieve. Don't just accept the first desired business result, uncover several to be sure you end up with a meaningful assignment. ***Ask questions like:***

- Help me see the business through your eyes. When you look at your P&L, what do you pay the most attention to?
- What areas of the business account for the bulk of your sales?
- Do you have some emerging or growth areas that are showing strong promise?
- What key business results are you focused on achieving this year?
- Which results are you having trouble achieving?
- What opportunities do you want to capitalize on in the future?

ASSIGNMENT

Summarize all the desired business results and select one to focus on. ***Follow these steps:***

1. Summarize the desired business results you uncovered so far.
2. Ask if anything is missing from the list.
3. Ask the advertiser to prioritize the list. Which is most important? Most urgent? Focus on an essential business result you have the capabilities to address.
4. Test the emerging "Assignment" by asking questions about already-existing plans, potential spending to solve the problem, and how soon the prospect wants to see potential solutions.
5. Agree on one or more Assignment(s) the prospect wants help with and you will work together on.

ANALYSIS

What is the problem to solve?

Once the assignment is clear, analyze the problem to solve. Find out what is getting in the way of achieving the desired business result. Lead with the consumer journey—focus on what they are trying to get the customer to do. ***Ask questions like:***

- Why are you focused on this business result? What makes it so important? What makes it tough to achieve?
- Who is the Target consumer? What consumer behavior will need to be influenced to achieve this result?
- What benefits do they seek? How does this advertiser stack up to competitors when it comes to delivering on those benefits?
- What is getting in the way currently?
- Describe the journey that brings them to making the purchase you want them to make.
- What are some of the things you need to see in the ideal solution?
- What has prevented you from having a solution already?

AGREEMENT

What are the best ways to measure success?

Agree on how to measure success. What expectations do they have and how they will measure the results. You should weigh in on this as well. It's good idea to have 2-3 ways to measure. ***Come to agreement by asking questions like this:***

- How would you describe the ultimate measure of success here?
- What return on investment are you looking for?
- Given our conversation about the consumer journey, what are some ways we can measure along the purchase path?
- What would be an early indicator of success?

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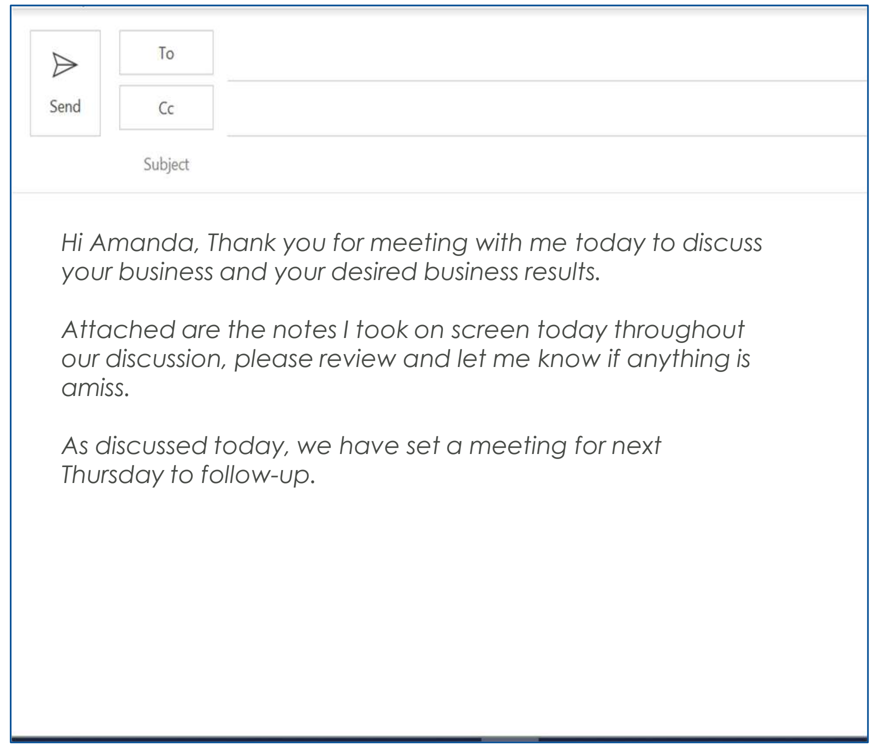
Guideline Seven

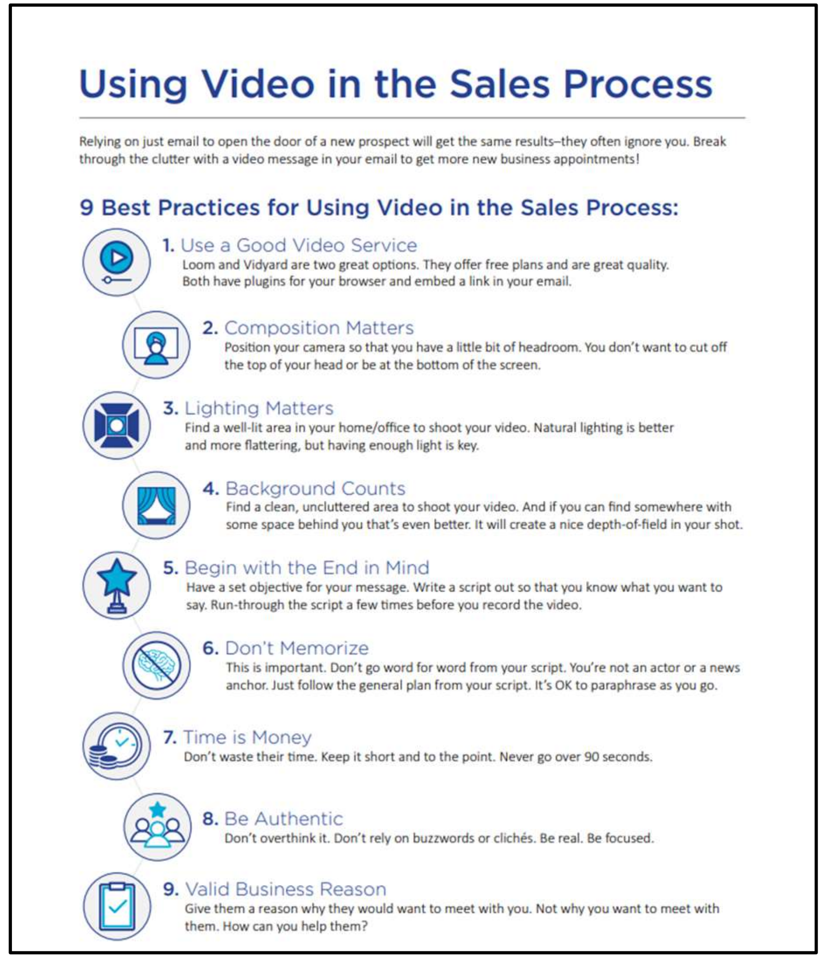
Finish the call

- Wrap up by asking what questions they have for you
- Secure the next step of the process
- Send your notes to the prospect as soon as the call is over



Additional Tips

- “Using Video in the Sales Process” Download
- Be mindful of someone's time
  - Start on time and end early
- Close Outlook before you start the meeting
- If a prospect wants to use their screen sharing app, check invite and download ahead of time if needed



Using Video in the Sales Process

Relying on just email to open the door of a new prospect will get the same results–they often ignore you. Break through the clutter with a video message in your email to get more new business appointments!

9 Best Practices for Using Video in the Sales Process:

1. Use a Good Video Service
Loom and Vidyard are two great options. They offer free plans and are great quality. Both have plugins for your browser and embed a link in your email.

2. Composition Matters
Position your camera so that you have a little bit of headroom. You don't want to cut off the top of your head or be at the bottom of the screen.

3. Lighting Matters
Find a well-lit area in your home/office to shoot your video. Natural lighting is better and more flattering, but having enough light is key.

4. Background Counts
Find a clean, uncluttered area to shoot your video. And if you can find somewhere with some space behind you that's even better. It will create a nice depth-of-field in your shot.

5. Begin with the End in Mind
Have a set objective for your message. Write a script out so that you know what you want to say. Run-through the script a few times before you record the video.

6. Don't Memorize
This is important. Don't go word for word from your script. You're not an actor or a news anchor. Just follow the general plan from your script. It's OK to paraphrase as you go.

7. Time is Money
Don't waste their time. Keep it short and to the point. Never go over 90 seconds.

8. Be Authentic
Don't overthink it. Don't rely on buzzwords or clichés. Be real. Be focused.

9. Valid Business Reason
Give them a reason why they would want to meet with you. Not why you want to meet with them. How can you help them?

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