

Assignment Six: Individual Activity— Pre-Call Planning

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The Approach

1. What will you say to build rapport and credibility?

Me: Hello Eric, I enjoyed meeting you at the UW Alumni fundraiser last winter and discussing your involvement with UW's academic services, I appreciate you taking the time out of your day to meet with me. As we discussed last winter, I work for Slack, a cloud-based software that provides a secure communication platform for organizations.

2. Why did you ask for this meeting?

Me: I requested this meeting with you because I think that Slack would be a great fit for the University of Washington. I understand that during the pandemic, classes at UW have been moved online. I know that a lot of universities have been struggling to make a smooth transition to a fully digital environment and I wasn't sure if this was a problem UW was currently facing as well.

3. What is your agenda for the meeting?

Me: During the meeting today I would love to tell you a little more about how Slack can improve and enhance the student experience. Additionally, I would love to get to know a little bit more about the University and any current challenges you may be facing, so I understand how I can best help you.

4. What is the value of this conversation to the stakeholder?

Me: In the past we have helped universities such as UC Berkeley, streamline their communication by providing a secure and reliable way to communicate in the digital space. UC Berkeley's integration of Slack has greatly enhanced the student experience, and I am hoping we can help UW in the same way.

5. What will you say to confirm that the stakeholder agrees with your agenda (or may want to make changes)—the trial close?

Me: Today, I am excited to learn more about the University of Washington so I can determine the best way to help you, does that sound okay to you?

Eric: Sounds like a good plan to me!

6. What will you say to transition so you can ask questions that help you better understand the account's strategic vision, priority business goals, and what the stakeholder needs to be successful?

Me: Great. I know that learning in a digital environment is a new and challenging transition from what the University is used to. I would love to hear how the University of Washington is managing this, and if there are any challenges they are currently facing that we can help solve.

Getting Educated

You should start by asking a few questions to understand or confirm the account's strategic vision and the account's two priority business goals.

Me: As I mentioned previously, it would really help me understand the University of Washington and how I can best help you meet your goals if I could learn a little bit more about the University. Specifically, what is UW's strategic vision, or what does the University want to accomplish in the future?

Eric: It is hard to put this all into words as I feel like UW has a variety of goals they hope to accomplish and achieve as a university.

Overall, I would have to say the University of Washington hopes to effectively educate a diverse student body that will become future leaders and responsible global citizens. The goal is to do this through giving students cutting-edge scholarship and providing them with a challenging learning environment that inspires them to excel.

Additionally, I believe the University strives to enrich the lives of people throughout the community, the state of Washington, the nation, and the world.

Me: This is really helpful, thank you so much for sharing. Additionally, what are the University of Washington's top two priority business goals?

Eric: Well in recent months the goals we had prior to the pandemic have been put on pause. Much like the rest of the world, we have really had to shift our priorities and change the way we operate. The University has made a huge transition to fully online courses in the last few months and it has really made us, the University as a

whole, take a step back and reevaluate. Due to this, our priority business goals have also changed in the past few months and there are two goals that have really stood out that we are hoping to address.

First, with the transition to online learning, the University of Washington wants to be able to provide the same top level education despite in-class closures.

Second, as unemployment numbers rise in Washington state it is likely that state funding will decrease so it is a goal for the University to decrease costs as well.

By meeting these goals, we hope to be able to still provide a quality learning experience to our students. Additionally, we hope to decrease costs, so we are still able to keep our staff employed, are able to provide financial aid to our students, and keep our university operating as normal as possible.

The sales conversation should then flow into asking more questions to understand how the stakeholder is involved in helping the account achieve either of those priority business goals.

Me: Thank you so much for filling me in. I can't imagine how difficult the transition to online learning was for a university the size of UW, and am glad to hear that your priority business goals have transitioned with the current climate. With your position as Associate Vice President for Academic Services & UW-IT CIO, how are you involved in helping the University of Washington smoothly transition to online courses and while keeping the same quality of education?

Eric: Well needless to say the last few months have been extremely busy and hectic for me. As UW-IT's CIO, I have had to help with the technical challenges the University has faced during the pandemic. Moving to a completely digital environment has put a lot of pressure on UW-IT to provide a quick and reliable solution. No one was expecting a worldwide pandemic, even though our department was equipped to implement online schooling on a small scale or for a short period of time such as snow days, no one was prepared for an event of this magnitude. We really had to put in extra time and effort to ensure that we were providing a secure and reliable solution to supplement in-person learning.

Additionally, my role as the Associate Vice President for Academic Services also requires me to aid in providing technologies, learning spaces, classroom support and services that enhance teaching, learning and research at the UW. My goal is to improve student's learning outcomes and improve the students' academic experience. I truly believe in the benefit of providing the best resources available in

order to equip students with the tools they need to excel in their academic endeavors.

So not only have I been hyperfocused on ensuring the smooth transition technically, but I have also been very concerned about how the solution we chose to implement will impact the students' ability to learn and receive a high quality education.

You will then want to ask questions to understand what the stakeholder has been doing to achieve the goal(s) and identify if the stakeholder is having any challenges/problems achieving the goal(s).

Me: It is good to hear about your involvement with helping the University of Washington meet their goals. When working towards these goals, what have you specifically done to help achieve these goals?

Eric: Specifically, I have helped implement the use of Zoom university wide. Zoom is a video conferencing software we are currently using for professors to give digital lectures.

In addition to the new integration of this software, I have been helping oversee the UW-IT team's integration of new software, management of existing software, and providing technical support to our staff and students. This includes technical issues related to software the University is currently using to communicate and run courses such as Canvas, MyUW, and Panopto. As courses are completely online, it has been a very busy time for UW-IT and we have been doing our best to provide top of the line software to UW employees and students.

On the academic services side, my team and I have been brainstorming ways to best implement a fully digital academic experience. Although our current reality of online classes most likely will not last forever, we realize the pandemic might not be over soon, and we need to continue to improve the online experience. We are definitely still looking for software that will help students reach their academic goals, learn effectively, and communicate freely as if they were still in an in-person environment.

Me: I think your involvement with UW is wonderful and I think that your goals are both realistic and will help further the students' academic experience. When improving the students' academic experience in the digital environment, have you run into any challenges or struggles when working towards these goals?

Eric: Although we have accomplished a lot in such a short period of time there are still a few areas in which we are lacking. Unfortunately, with classes being online it's

hard to replicate a classroom environment. Meaning that there is still a lack of student interaction and communication when compared to an in-person class. Zoom has been great for a lecture substitute, but does not allow students to easily communicate with one another outside of class time. Initially, we were hoping students would utilize Canvas more for communication with one another. We have been struggling with Canvas, it is great when implemented with in person classes but struggles to provide an all encompassing experience. Canvas currently offers a messaging feature, but it is mainly used for submitting coursework and viewing class materials. Its messaging feature acts more like an email, and is not as an efficient messaging tool as we had initially hoped for.

With courses being online, we want to provide students with an experience that is as similar to in person courses. This means that UW is still operating classes like normal and still implementing group projects, student discussion boards, and expecting students to collaborate on group assignments. By moving courses online, we have found that it is difficult for students to continue to do group work as they have never even met face to face. Additionally, we don't offer a software or platform that the students can easily and quickly communicate with one another. This is an area that I think we need to improve to enhance the student experience.

Me: Thank you so much for filling me in and letting me know where the University of Washington is currently at. Based on what you have told me, I can see that the University of Washington has made great strides to improving the student experience, but are struggling to provide students with a seamless experience that mimics the learning environment of traditional teaching. I can confidently say that I believe that Slack can help with your current situation and can aid in delivering a cohesive and seamless online environment.

When the stakeholder expresses a need to solve or fix “the problem” and you fully understand the need then you can use FAB to begin to educate the stakeholder on how your product/service could help. Please also script the FAB section—you may want to refer to Assignment Three: TEAM Activity—SALE 1.

Me: Slack's subscription includes an advanced channels feature **[feature]** that creates an organized workflow and a designated space for a project team **[advantage]**; this allows for increased communication and alignment among team members **[benefit]**. Does this sound like it will meet students' need for a space to communicate among group members **[trial close]**?

Eric: This sounds exactly like what we have been looking for. Does Slack have capabilities other than group messaging?

Me: Yes, Slack also has collaborative file and document sharing capabilities **[feature]**, which means information can be securely and quickly shared within a group **[advantage]**. This allows teams to have increased communication and quick access to information to power decisions **[benefit]**! What are your thoughts on this feature **[trial close]**?

Eric: I think that this sounds great so far. I am not sure if adding another software for students to use regularly would be overwhelming though.

Me: No need to be concerned, this is not something to worry about! Slack could potentially condense the software you currently use into one place. With over 1,500 apps integrated with Slack, including Zoom, **[feature]** this allows users to access and share data within Slack **[advantage]**. By synchronizing everything into one-place, the benefit is streamlined communication **[benefit]**. Not only do I believe this feature will be helpful during the pandemic, but I think this could provide long-term benefits to the University as well. How does that sound? **[trial close]**

Eric: Wonderful, so far everything sounds great. I am definitely interested in Slack and think it could be a valuable asset to the University.

Me: That is great to hear that you are interested in the benefits Slack can provide the University of Washington. After speaking with you I am confident in Slack's ability to help you reach your goals and overcome the challenges you are currently facing.

Eric: This sounds great, I am excited with what I am hearing. I definitely think that Slack could be just what we are searching for.