Overview

This training simulation engages participants in a realistic on-the-job sale. It is an enterprise sale for a global company, Gartner. In this fictional scenario, reps will work in teams of 4 as the North American rep assigned to Gartner. Participants will need to team, use all applicable systems, tools, and methods to prospect, pitch and ultimately sell work at Gartner.

Gartner, Inc. (NYSE: IT) is the world's leading information technology research and advisory company. We deliver the technology-related insight necessary for our clients to make the right decisions, every day. From CIOs and senior IT leaders in corporations and government agencies, to business leaders in high-tech and telecom enterprises and professional services firms, to technology investors, we are the valuable partner to 60,000 clients in 11,600 distinct organizations.

Along the way, participants will contend with tight timeframes, wrenches in the sales process and typical client obstacles and objections. During the simulation, participants will have 5 meetings with Gartner employees as they make their way through the Sales Stages/Process.

The participants will be grouped into teams of four and will collaborate to strategize the account, create deliverables (such as model pitches and demos), prep for client meetings and support each other's learning. For each of the five simulated meetings however, only one participant per team will actively lead the meeting. Coaches will notify the team member who will lead the meeting immediately beforehand. This will ensure that all participants prepare thoroughly for an active role. Participants who are not leading the meeting will then observe and critique their team member's performance and offer constructive feedback (facilitated by the coaches) immediately afterward.

Gartner Clients We Meet (5 Meetings Total)

WHO	ROLE	MEETING	PURPOSE
Michelle McGrath	Vice President Sales at Gartner / Events Division	Reps will meet Michelle during Meeting #1, 2, and 4.	Michelle is our buyer or Decision Maker. Reps will need to sell to Michelle.
Brian Martin	VP of Sales Productivity / Ops at Gartner	Reps will provide Brian a Demo during Meeting #2.	Brian is reviewing the features and benefits of (SAAS PRODUCT) (during a demo) for Michelle (who cannot make the meeting). Brian is also a bit of an obstacle given his prior experience with your company.
Chris Lafond	CFO for Gartner	Reps meet with Chris LaFond (in addition to Michelle McGrath) during Meeting #4.	Chris LaFond is the CFO for Gartner. Even though Michelle is the Decision Maker, Chris will sit in on meeting #4 to ensure Gartner is getting the best price.
Chris Moore	VP for Gartner Consulting / Gartner Consulting	After we fast-forward the Gartner account 9 months, reps meet with Consulting, a different business line in Gartner, for Meeting #5.	Given less than stellar usage (and a few rock stars), reps will need to attempt to penetrate a different line of business at Gartner.

Sales Excellence Sim - Simulation at a Glance

Day	Timing	Part	Storyline	Skills / Leading Practices	Deliverable(s)
Day 1					
1		"The Sales Excellence": Introduction	SALES EXEC to Kick us off in Plenary. • For the next 3 days, you all have a new client – Gartner • Working in a team of 4, you'll all play the North American rep for Gartner. • Your goal, over the next 3 days is to work with your team to prospect, pitch and sell work at Gartner.	• N/A	• N/A
1		Transition	Move from Plenary to Breakouts	• N/A	• N/A
1		Part 0: Simulation Kickoff	Coaches deliver Simulation Kickoff speech and lay ground rules for simulation. Coaches point participants to Leading Practice Tool Kit, goal of Gartner account and get them started on Account Plan.	• N/A	• N/A
1		Part 1: Account Plan & Meet with Coach	**Participants receive:** • Company and prospects from the coaches (Gartner). • Email from Leadership outlining ask to take on the account. • 60 minutes into the sim, coaches will meet with each team to review Account Plan, provide feedback and multi-thread options. • If teams choose correct multi-thread partners, coaches will provide 'responses' which shed more insights on Michelle McGrath and Gartner. **First 60 Minutes, Participants will:**	• Assess client • Strategize Account • Customize Model Pitch • Determine Insights to share • Determine best person to multi-thread with to garner insights on Gartner • Leverage constructive tension techniques • Identify opportunities to teach client with insights about their business	• Account Plan • Customize Model Pitch / Magic Wand • Prep for Account Plan Review • Prep for Meeting with Client

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			• 60 Min: Conduct Account Plan **Last 60 Minutes, Participants will:** • 60 Min: Customize the Model Pitch • Prep for meeting **Wrenches:** • Email: 60 minutes into account strategy, after coach meetings, teams receive an email from SD, they have a meeting with Michelle McGrath that evening.		
1		Part 2: Meet with **Michelle McGrath** / Client Meeting /Customized Model Pitch	Participants will meet with Michelle McGrath, VP of Sales for Events in Gartner / North America **Interruptions / Wrenches will occur that participants must address:** • Client rides hard on free tool • Does not understand the UI • Budget holder, but they don't have any budget for this right now • Wants to see Demo • Tells Team he/she is not able to make a decision without involving Ops/XYZ	• Use Insights to teach client with Model Pitch. • Employ Constructive Tension techniques. • Employ active listening skills. • Ask insightful and probing questions. • Garner agreement to move forward with Demo. • Capture next steps • Confirm agreements and decisions. • Confirm who else should be involved and take next meeting together. • Get buy in that this is something Michelle wants…	• Performance in Meeting or Observation and Critique • SoE email to "Client" Post the Meeting • Follow-Up Deck (*New Marketing Deliverable*)
1		Part 3: Prep for Recognize Gap / Demo Meeting with **Michelle McGrath & Brian Martin** (*prep will continue into the night*)	Prep for Meeting with Michelle McGrath & Brian Martin, VP of Productivity and Ops at Gartner. **Post the Meeting, Participants Receive:** • Email from Brian Martin about AM Demo meeting **Interruptions /Wrenches will occur that participants must address:** • Client provides email at end of day	• Gain Insights about new prospect • Customize teach client; cater to their business • Create demo that creates a sense of urgency with customers to buy now rather than later	• Demo • Pitch • Prep for Brian Martin/VP Ops Meeting

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			letting them know they can't make the meeting, but Brian Martin will. Michelle: Excited. Brian, to review for Features and Benefits. • Note – coaches will tell teams they only have one shot with Brian.		
1		Part 4: Day 1 Debrief	Discuss day's events, lessons learned, and best practices. Take notes that will enable them to write goals later.	• Identify and share strategies for handling the types of experiences they encountered during the day. • Identify lessons learned. • Reflect on areas for potential growth. • Develop rough goals, and actions that would enable achievement of those goals.	• N/A
Day 2					
2		Part 5: Recognize Gap / Demo Meeting with **Brian Martin** *(only)*	Participants will meet with **Brian Martin,** VP of Productivity and Ops at Gartner to execute a Demo. The Goal is to validate pipeline is the biggest challenge for prospect. **Interruptions /Wrenches will occur that participants must address:** • Brian is not an easy prospect – he's not interested in having the product or involved in their process. • If teams do research, will find Brian has been approached by the sales team before.	• Meet with client to Demo (lite pitch) SaaS Product • Ensure client validates pipeline is biggest challenge • Create enough constructive tension so client recognizes SaaS Product can significantly alleviate pipeline challenge • Craft compelling and correct SoE	Performance in Meeting or Observation • SoE email to "Client" Post the Meeting
2		Part 6: Prep for Define Criteria Meeting with **Michelle McGrath**	Prepare preliminary close plan to build with client. Prep for Define Criteria Meeting.	• Create close plan to present to client • Speak fluently to price, close and adoption supports for SaaS Product	• Close Plan
2		Part 7: Meeting with **Michelle McGrath to** Define Criteria and co-author close plan	Get client to agree they can move forward. Outline BANT. **Interruptions /Wrenches will occur that participants must address:** • Client Wants Pilot.	• Use constructive tension techniques to get the client to agree they can move forward with the purchase (not pilot) of SaaS Product • Put forward value proposition to overcome ROI hurdle • Respond to Pilot ask accordingly • Walk-through close plan process with client	• Performance in Meeting or Observation and Critique • SoE email to "Client" Post

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			• Client Wants ROI from similar clients or framework for ROI to help justify investment. Wrench: Right before the meeting	• Craft compelling and correct SoE	the Meeting
2		Part 8: Prep for Gain Business Meeting with Michelle McGrath and Chris Lafond, CFO	Team Prepares proposal to present to Michelle McGrath and Chris LaFond. **Interruptions /Wrenches will occur that participants must address** • 20 minutes before the meeting, reps receive an email from Head of Sales – Michelle McGrath wrote Deep asking for a deep discount given Gartner's work with our company (500K dal)	• Prepare proposal to present to client. • Overcome legal issues regarding agreements and price • Embed correct SPC integrations in close plan	• Proposal • SPC Service packages & request SPC support • Roll out plan, dates, SPC, trainings, etc.
2		Part 9: Meeting with **Michelle McGrath** and **TBD,** VP of Procurement	Gain business. Walk through final package. **Interruptions /Wrenches will occur that participants must address** • Respond to email to Deep/ask for a discount given prior work	• Walk through final package • Overcome, successfully, a discount request by presenting our pricing philosophy • Ensure client agrees to move forward/sign proposal • Outline adoption process and next steps	• Performance in Meeting or Observation and Critique • SoE email to "Client" Post the Meeting
2		Part 10: Prep for Expansion Meeting with Gartner Consulting VP Chris Moore	Fast forward 9 month out. Participants will receive an overview of what has happened at Gartner the last 9 months (from internal side and Gartner side) and a usage report. **Goal:** Have renewal meeting resulting in meetings set up with two other divisions of Gartner company **Interruptions /Wrenches will occur that participants must address** • Some people are rocking it. Some people aren't. 30-40% of the people not	• Evaluate usage report data • Radical Ignorance. House. Open to whatever the data said • Prepare to have a value base discussion with Gartner to garner account renewal • Strategize renewal presentation and discussion • Calling a new group	• Renewal Presentation

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			using it well. • Opportunity to sell into Gartner Consulting		
Day 3					
3		Part 11: Meeting with Client for Expansion / Gartner Consulting VP Chris Moore	Have renewal meeting resulting in meetings set up with two other divisions of Gartner company. (i.e., assess what the real value at the client)	• Understand how they are using it, value (make the effort to do that). Ask: How are you diving it amongst your people? How are they seeing success? What are they doing? How are they seeing value? Get client to see how value can be enhanced. • Garner client agreement to discuss expanding scope with two other divisions of Gartner company	• Performance in Meeting or Observation and Critique • SoE email to "Client" Post the Meeting
3		Part 12: Close the Sim	Debrief the sim. Final acknowledgement	• Reflect on final take-aways. What you'll do differently on Monday.	• Debrief
3		Simulation Winners Announced		• Prizes. • Bragging Rights. Woot! Woot!	• Prize given