Cast Guide #1: Michelle McGrath

Note: *This information is intended to help you understand your character, your character's goals, what your character knows, and how your character would react during the meeting.*

Meeting Snapshot	
Timing	**30 minutes (20 minutes as cast member / 10 minutes providing feedback)**
Overview	You (Michelle McGrath) are the VP of Sales for Gartner Events have a meeting with a rep. A few weeks ago, you responded to a campaign requesting more information about a SaaS Product after hearing about it at a tech sales conference in San Antonio. Someone from the company selling the product contacted you, did a general qual, and now you have this meeting to learn more. You are generally interested but are not clear on the value of paying for a subscription – it's all the same stuff to you. You're also a fan of keeping systems and processes simple – if it doesn't easily integrate into the way your team currently works, you're not interested. While you're genuinely amiable, reps will need to truly sell you the value of the SaaS Product in order for you to move.
Meeting Purpose in Simulation	The primary goal of this meeting is to allow participants to deliver our model pitch using constructive tension and insights. The reps' goal for this meeting will be to get you to agree to: • Move forward with a demo • Bring another decision maker or influencer to the demo meeting (ideally ops)
Your Goals & Attitude During the Meeting	• **You're an amiable person…almost too amiable…**but want people to teach you something new and not waste your time. Easy to bond with, almost too easy. Agrees with everything and will not elaborate on responses unless asked to. • **You Are a Champion**: Genuinely likes the current product set. Big believer that all her reps should be on and use daily. • **But You Don't Want to Pay**: Although, you're not too hot on the idea of having to pay for a subscription. • **Learn More About the SaaS Product**: You actually really want a demo – more than anything. You submitted a request for more information after you heard about the product.
Facts to Share *if Asked*	Your Work Tasks • **Typical Industry, Role, Cent You Sell To:** o Gartner sells to sales and marketing leaders of technology

vendors that are ideal to partner with at Gartner Events. Through a trusted collaboration, we develop together strategic sponsorship solutions that will allow vendors to achieve their strategic goals and objectives such as brand awareness, messaging, thought leadership, business development and lead generation.

- o Budget: Main DM on purchases for Sales but likes to involve cross-functional parties to influence your decision. Ultimately, for purchases over $25K you like to get the CFO's blessing.

- **Influencers**: Gets recommendations from Sales Ops to evaluate most tools.

- **Relationship with Deep:** You have a very casual relationship with Deep. Met initially when Deep was at Google and happened to run into her at a conference a couple months ago and had some small talk and Deep suggested you check out the SaaS Product. You blew it off at the time. You also don't like to talk about your relationship with Deep. But having read about the product recently, decided to go online and learn more and came across the lead form when viewing a presentation and decided to fill it out.

Profile for Michelle McGrath:

Michelle McGrath is the SVP of Sales for the Events division at Gartner*. She has been with Gartner for 13 years in various roles – starting in Lead Gen and moved up the chain. She is very connected within Gartner and has a few connections. A 'Gartner-fer' as she calls herself, Michelle, loves Gartner as her role has afforded her challenging work and a nice lifestyle to boot.

Other notes to share/react to if asked:
- Grew Up: Grew up in NYC in Queens. Mom was a playwright. Dad worked a government job.
- School: University of Delaware. Played her freshman and sophomore year. Decided to focus more on academics…and she got booted from the team.
- Passions:
  - NY Giants: Loves that Flacco won the Super Bowl because she was a Delaware grad.
  - Family: Has two girls (ages 5 and 7) and a husband, Mike.

Concerns and Interests

Michelle has several things on her mind when it comes to her business:
- **Her Team:**
  - Has 350 people working for her. 250 reps 100 Sales Management.
  - Given Q3, her team is experiencing a bit of fatigue.
- **Making Annual Number**:
  - She's concerned 30% of her people aren't going to hit their number because they're "spinning their wheels."
  - What that means is: she misses her commitment to the CFO.
  - Attrition – If 30% of the team doesn't make their number, she'll lose 10-15% of her reps. That might also be a good thing when it comes to thinning out the herd, might also be a catastrophe.
  - Pipeline – historically they need 4X pipeline to make goals. They are running at 70% for the rest of the year and into next. This means she may have to forecast growth at a lower rate than the long-term guidance provided. This would risk a loss of faith from the CFO and CEO. More meetings would help with top of pipeline building.
  - Her reps just need more meetings. Pipeline is not good and should be better. Single thread is an issue meaning her team often only has a single contact within a target account when they should be multi-threading in accounts to get buy in from multiple influencers and decision makers.
- **Adoption by Team for Reporting:**
  - Concerns around adoption of tools and usually leaves that stuff to Sales Ops and others but loves the company and that is why she took the meeting.
- **Relationships**:
  - Michelle is a relationship person and believes you leverage your network to get places.

Mood and Behavior During the Meeting

- **Classic Love. No Pay:** Classic gal who loves and doesn't understand why pay for it when it is already so valuable.
- **More Insights. More Engaged:** Just agrees with things a lot in the beginning, as reps share new insights, and she gets increasingly more engaged.
- **Wants Demo Halfway Through:** Halfway through she asks to go online to see demo. Just doesn't understand why not stick with free and the best reps are already using a lot. If she saw it, then she would probably get a better idea of how it would work. Integration with other tools would be cool to see too.
- **Light Clicks When Team Talks:** When she learns about the product and the power of it then she starts to be less concerned about the demo. Starts to see the light when learning about the tool because she recently found out about a deal lost to a competitor where she was connected to primary DM. She could have easily helped the rep get the meeting face to face with that DM to prevent losing deal. Takes a while to understand. Just agrees when hearing about it but does not really seem to get it. *Finally, if explained twice she will get it.*
- **Integration Takes Her Over the Edge:** Wants to scale to entire group. Sales Ops will have to be involved. Plans to get demo and then tell Sales Ops about it. *Rep should ask to demo to Sales Ops to prevent letting Michelle control the next step.*
- **Highlight Super Start Carter Meyers:** Insights on how Reps who have the client tool use a lot more than free users will really help Michelle understand why this is so valuable. If Reps showcase Carter Meyers (Business Development/Lead Gen Guru in Michelle's Group), this light will click for Michelle.
- **Biggest Concerns:**
  - Training and measurement / ROI.
  - Does not like to buy big. Why buy big when we can pilot the tool? I want to make sure reps adopt it and it can be measured – ROI is important to you, because that has been an issue in the past.
  - Adoption of tools is also a concern. Not sure if other options are being used.

*More About 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 cents 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 cents in over 13,000 distinct organizations. Through the resources of Gartner Research, Gartner Executive Programs, Gartner Consulting and Gartner Events, we work with every cent to research, analyze and interpret the business of IT within the context of their individual role. Founded in 1979, Gartner is headquartered in Stamford, Connecticut, USA, and has 5,700 associates, including more than 1,435 research analysts and consultants, and cents in 85 countries.

The interactions below show the responses that your character would have to the Rep conducting the meeting.

Insights		
If the Rep…		*Then you would…*
+	Shares the following insights: • Does the rep mention if Gartner is currently using for sales? (SSI) • Does the rep mention if Gartner lags/leads competition? (SSI) • Does the rep mention if they are already spending on premium subscriptions? (# of prem subs, how this has changed)	Become increasingly more engaged; conversant.
-	Does not share any new insights with you throughout the conversation	Become disengaged. Say, "you're not telling me anything I don't already know…"
Constructive Tension		
If the Rep…		*Then you would…*
+	Consistently uses constructive tension techniques like, silence, open-ended questions, double-clicking on responses	Pause, reflect, and provide insights about your business.
-	Does not use constructive tension within the meeting	Just go along with the conversation. Become agreeable without really agreeing - to move them along and get them out the door.
Team link		
If the Rep…		*Then you would…*
+	Highlights the power	Takes a while to understand. Just agrees when hearing about it but does not really seem to get it.
+	Highlights the power, a second time using Carter Meyers as an example	The light would finally click on. You respond by sharing a story, "I recently found out about a deal lost to a competitor where she was connected to primary DM. She could have easily helped the rep get the meeting face to face with that DM to prevent losing deal."
-	Explains in a canned way, not customized to your business	Just agree, but do not seem to really get it.
Integration		
If the Rep…		*Then you would…*
+	Discusses integration with other tools in a customized way	Grin. You love this. You start to talk about the client tool being an enterprise-wide solution.
-	Explains integration with other tools in an unclear way	Just agree, but do not seem to really get it.
Want for a Demo		
If the Rep…		*Then you would…*
+	Takes control of the conversation and asks for a follow-up meeting for demo	Scale back on asking for the demo. Let them continue with the pitch.
-	Cannot control the conversation well	Keep asking for the demo.
Ask You to Bring Someone Else to Demo		

If the Rep…		Then you would…
+	Asks if anyone else should participate in the demo (influencer, another line of business, etc.)	Agree, you'd like your VP of Ops Brian Martin to join the meeting. Explain she'll join you.
-	Doesn't ask if someone else should be invited	Don't offer anyone else.
Next Steps / Meeting Close *If the Rep…*		*Then you would…*
+	Says they will follow up with a Sequence of Events email explaining what you talked about	Respond very positively.
-	Does not offer a Sequence of Events email	Ask if they will follow-up with notes and next steps via email.

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Scorecard

Directions:
Use this scorecard below to score the reps performance in Meeting #1 with Michelle McGrath.

Team Number:
Name of Rep:
What Should the Rep:
   Start:

   Stop:

   Continue:

How Well Did the Rep…						
Rapport	*Build rapport and relationship with you*	1	2	3	4	5
Insights	*Bring the following Insights to the conversation:* • Does the rep mention if Gartner is currently using for sales? (SSI) • Does the rep mention if Gartner lags/leads competition? (SSI) • Does the rep mention if they are already spending on premium subscriptions? (# of prem subs, how this has changed)	1	2	3	4	5
Constructive Tension	*Use constructive tension throughout the meeting*	1	2	3	4	5
Demo	*Get you to move forward with the demo*	1	2	3	4	5
Additional Decision Maker	*Get you to agree to bring another decision maker or influencer to the demo meeting (ideally ops)*	1	2	3	4	5
	TOTAL					

Scoring Legend	
1	**Negative Performance**
2	**Low Performance**
3	**Met Expectations**
4	**High Performance**
5	**Exceptional Performance**