Meeting #1 Prep Overview

Account Plan & Meeting Approach
Tuesday: 2:00-4:00

Session	Activities
Kickoff (10 minutes)	✓ Enter the room and welcome participants ✓ Make sure everyone is clear on where to sit ✓ Introduce this prep meeting and timeframe ✓ Let everyone know they will be creating an account plan & strategy for Gartner
Work Session (1:50 minutes)	✓ Review relevant documents in ***Leading Practice Toolkit:*** Account Plan Template ✓ Review leadership email ✓ Allow participants to prep for meeting. ✓ 60 minutes into prep start checking in and review account planning and multithreading contacts ✓ Around the same time (60 minutes in), reps receive an email from SD that they will be meeting with Michelle McGrath (VP Sales/Events). ✓ Review ***Leading Practices Toolkit:*** Model Pitch Leading Practices so reps can prepare for Michelle meeting. ✓ Conduct checks through remaining work session to ensure reps are on track. ✓ Transition to Ballroom for Meeting with Michelle.
Debrief	✓ Session debrief at start of Meeting #2 Prep ✓ End of Day Debrief see EOD1debrief doc

Materials and Handouts	
Coach Materials	Participant Materials

• Email from Leadership about Gartner
• ***Leading Practices Toolkit*** for Meeting Prep 1
  o Account Plan Template
  o Model Pitch Deck (use 60 minutes into prep)
  o Marketing Template ***(new)***
• ***Handouts:*** Sales Stages Placemat, Multithread insights (3 Gartner, 2 LI)
• ***Wrench:*** Email from SD
	• Email from Leadership about Gartner
	• ***Leading Practices Toolkit*** for Meeting Prep 1
	  o Account Plan Template
	  o Model Pitch Deck (use 60 minutes into prep)
	  o Marketing Template (new)
	• ***Wrench:*** Email from SD

Flow and Deliverables

Flow

- The simulation begins with the participants receiving an email from Leadership. The email orients participants to the project at a high-level, alerts them to where they can find key project data, and notifies them of an upcoming meeting with a contact at Gartner. Coaches conduct Leading Practice Tool Kit review of Account Plan.
- Once up to speed, the participants complete an account plan using account planning template (gathering insights on Gartner, multithreading, determining a DM to meet with, etc.).
- (Around 60 minutes in) Coaches meet with participants to discuss progress and provide guidance. If teams choose correct multi-threading partners, coaches will provide 'responses' which shed more insights.
- During the prep time (60 minutes in) teams receive email from SD they have a meeting with Michelle McGrath that evening simulation.
- Coaches conduct 2nd document review of Model Pitch Leading Practices (in preparation for Michelle McGrath meeting) / Model Pitch Deck
- Coaches continue to provide feedback and let reps know they need to also build out custom model pitch deck.
- End prep meeting and transition to ballroom.

Deliverables

- Account Plan
- Customize Model Pitch/Magic Wand

Skills Practiced

- Assess client
- Strategize Account
- Customize Model Pitch
- Determine Insights to share
- Determine best person to multi-thread with to garner insights on Gartner & Michelle

Skills Practiced
McGrath • Leverage constructive tension techniques • Identify opportunities to teach client with Insights about their business

Meeting #1 Prep Structure

Session	Step-by-Step
Kickoff (10 Minutes)	✓ **Enter the room and welcome participants** • Make sure everyone is clear on where to sit • Make sure everyone has a group and knows who their team members are. Tell everyone to sit at their table number. • Should be teams of 4 – predetermined and referenced on their name badge. • Teams are mixed by a representative from each role (as much as possible) and mixed up by region. ✓ **Remind participants they will need to go through this sales process with real client meetings in breakouts/move to ballroom for actual meeting with cast member** • They will work in this room for prep and then go back to the ballroom for the actual meeting. • All participants should be prepared to lead the meeting, but just one participant will lead the conversation; each team member will lead one of the five interviews during the simulation. • All meetings will be 30 minutes total: o 20 minutes w/ Cast Member & 10 minutes feedback ✓ **Simulation timeframe versus actual timeframe** • Let participants know that this simulation is taking place in an abbreviated timeline. They need to imagine that this first meeting is in 2 days, (but they really only have (refer to schedule for amount of time)). • What are the things they would want to do 48 hours prior to the meeting, so they are prepared? ✓ **Goal for this prep meeting** • Let everyone know they will be creating an account plan for Gartner ✓ **Sales Stage Reinforcement** • Let participants know that we will reinforce the sales stages as part of the process, we will be discussing which sales stage we are in with every meeting, as well as which sales stage was missed due to time constraints in the Simulation. ✓ **Sales Stages for this 1st meeting:** (Prep) & Introduction

Work Session
(1:50 minutes)
	✓ Introduce this section…***(paraphrase)***
	• You should have received an email from Leadership around a client - Gartner.
	  ○ ***Please hold off looking at the email, until we finish this intro…***
	• You will be going through a simulation with Gartner and real prospects.
	  ○ ***Do not contact anyone!***
	• You may look up prospects and gather insights. We will supply a fictitious email address for any communications that we ask you to send.
	• Turn your privacy settings to anonymous.
	
	Deliverables for the prep meeting:
	This is the first preparation meeting, and you will be focused creating an account plan.
	
	Introduce and Review relevant Materials
	• Remind participants that they have received the Leading Practice Toolkit and email from leadership - as prework prior to this Sim
	  • **NOTE:** As reps should have reviewed materials as prework – during materials review, select a rep to explain the applicable document to the class.
	• Tell participants that now they can open their email from Leadership!
	• Remind participants they should use all the tools and systems available to them to get smart on Gartner.
	
	Document Review #1 (materials applicable to this part of prep)
	• Review the email from Leadership
	• **Call on a rep to explain:** Open, review, and discuss the purpose, when to use and how to use Account Plan ***(new)***

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✓ Allow participants to grapple with project materials and begin prepping for the Gartner meeting.

Around the 60-minute mark, meet with your teams, one-on-one, to review their account plan thus far.

What are your goals for meeting?
Have you prepared for meeting?
Do you have your account plan properly filled out?

Provide guidance and review the following:

Multithreading – did they come up with the correct people we identified or find appropriate people who meet criteria including:

SSI
A buyer or influencer
Who they are connected to in target account
Other criteria

If they came up with the correct multithreading partners, provide handouts that shed more insights.
If they did not come up with correct multithreading partners, then let participants continue as is.

✓ Wrench: For Coaches Only – do not share in advance with participants

(About 60 minutes into prep) Teams receive an email from an SD stating that they have a meeting with Michelle McGrath that evening.
Once this email has gone out – write name of client and meeting time on board (refer to meeting schedule for time).

✓ Document Review #2 –Call on a rep to review/explain materials:
Now that reps know they are meeting with Michelle McGrath, review:

Model Pitch Leading Practices
Marketing Template (new) as a follow up to meeting.

✓ Conduct checks throughout the remaining work session to ensure that teams are on track and preparing for the meeting. Ask these questions:

Does your model pitch include the appropriate insights?
Are you confident about Gartner/their business and the Events Division?
Do you have appropriate information about Michelle McGrath so they can articulate and sound confident in a conversation?
Have you anticipated potential objections that could come up – if so, which objections are you ready for and how would they respond?
Have you been able to practice constructive tension in the pitch? What do you need to get out of meeting to move to next stage?

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Work Session Wrap up	**15 minutes before meeting time (based on meeting schedule)** **End Prep Meeting…** **To do before the Meeting #1 w/ Michelle McGrath** ✓ Deliverables rep needs to take to meeting include: o Customize Model Pitch/Magic Wand ✓ Assign a presenter ✓ Let reps know which Cast Member table to sit at in Ballroom ✓ **Provide ground rules for meeting** o They have 20 minutes to meet with Michelle McGrath and 10 minutes for feedback (total 30 minutes). o Observing participants need to be silent and may not interrupt to assist the person leading the meeting. o Observing participants should fill out the feedback form with their observations and be prepared to deliver constructive feedback afterward. o After the meeting, there will be 10 minutes to discuss how it went, offer feedback, and think through alternative methods. ✓ Hand out Feedback forms ✓ Provide instructions for what team members should be doing when they're not in meetings. ✓ Escort teams to meetings and remain to observe.
Debrief	✓ Session debrief at start of Meeting #2 Prep ✓ End of Day Debrief see EOD1debrief

Email from Leadership

Sent: Tuesday, August 20
To: North American Gartner Rep Team
Subject: Thanks for Taking on Gartner!

Hey all,

Thank you for taking on the North America account for Gartner. As you know, the company has not sold work to Gartner as of yet, and this is a potentially large opportunity for us.
A few things to do immediately with your team:

- **Get Smart on Gartner**: A key process – use all systems and tools available to you in any sale to get smart about Gartner.
- **Account Strategy**: Leverage the account planning template in the leading practice tool kit to strategize how you'll penetrate Gartner.

A few keys to success: a) work together as a team b) use the leading practice toolkit and all systems and tools available to you and c) flex constructive tension and insights to win Gartner's business.

Your coaches will want an update on your Account Plan in about 60 minutes – so get started.
Next play,
Leadership

Multithread Responses

Following are responses to provide – if participants identify correct multithreading partner (for coach reference).

YOU HAVE A NEW MESSAGE

From: Dominic Coleman
Date: Tuesday, August 20
Subject: RE: Gartner Inquiry to Dominic Coleman

Hey,

Thanks for your interest in Gartner!

I'm a huge fan of your tool and would love to chat with you more. Unfortunately, I'm on holiday with my family until the end of August, so no can do. My wife would kill me.
I've been with Gartner since 1998 and have seen it change many times. And, like many orgs, our lines of business have different cultures and operate a bit differently. One of the more progressive lines is definitely in the Events space – since they live and brand in the digital space. They're always looking for companies to co-sponsor events, garner participants, etc. Not an easy business.

So, you might want to start there. Just a thought.

Cheers!
Dominic

YOU HAVE A NEW MESSAGE

From: Kurt Shaver
Date: Tuesday, August 20
Subject: RE: Gartner Inquiry to Kurt Shaver

Hey,

Great to hear from you – happy to shed insight on Gartner. Anything for my Brothering.

I just gave my buddy Frank Capovilla, VP of Sales at Gartner a call to see what his thoughts were on an entry point for the company. Frank's a pretty traditional guy (came from Xerox) – I have been trying to get him to do something with me for a long time. He and several of the VP on the Consulting and Events space have been discussing social selling recently. We just haven't had a chance to engage yet.

I did have a call with Sales Ops, but those guys weren't very interested in taking my call.

Cheers,
Kurt

YOU HAVE A NEW MESSAGE

From: Kurt Shaver
Date: Tuesday, August 20
Subject RE: Gartner Inquiry to Carter Myers

Hi there,

Happy to help shed light. I'm in Business Development within our Events Space. A buddy of mine turned me on to the client tool a few months ago and I've integrated it into my process ever since.

- I love the tool and use it every day to secure meetings. It is a great solution for me. Just last week, I found one of the field reps on in the Central region new the CIO at Liberty Mutual. I was able to use that relationship to secure a meeting.
- I also use InsideView, as many of my colleagues do. We've had subscriptions ever since I've worked here.

Appreciate you reaching out – but I'm ultimately not the guy you want to talk to – no budget for this type of stuff. Good luck with your process.

Cheers,
Carter

Sent: Tuesday, August 20
To: North American Gartner Rep Team
From: Michelle Tonner
Subject: RE: LMS Information on Gartner

Hey all!

Thanks for reaching out.

Let me start off by saying we're almost at a point where we can close the account with Gartner. Here's the scoop:

- Huma introduced me to Elizabeth Galvin – Gartner's Social Media Manager.
- I've also been taking with Barry Edelman, a Digital Marketing Director in Gartner Events
- Between the two groups, I'm about to close a 25K deal with Events and social media looking for Display and Text Ads to Marketing Leaders.

A few things to know about Gartner:

- **Budget:** They have tried to make us go down on our prices because of all the money they've put into Talent Solutions. I've stuck to my guns about the minimum spend by focusing on the value of the solution. It literally came down to me saying, "You won't get the results you want if you go for a smaller deal."
- **Value:** Value for our marketing solutions is really our ability to target professionals since they have such specific roles they go after.

Good Luck.
HMS! Woot!
M

Sent: Tuesday, August 20
To: North American Gartner Rep Team
From: Huma Khan
Subject: RE: Information on Gartner

Hey Friends!

Suuuuuper busy and out on PTO but wanted to get back to you really quickly.

Sold work to Gartner last December – App. 500K deal. I've found most people at Gartner to be advocates – but they are definite sticklers on price – so watch that.

Good luck,
Huma

Wrench Email from SD –M McGrath Meeting

Sent: Tuesday, August 20
To: North American Gartner Rep Team
Subject: You Have a Meeting: Michelle McGrath / Gartner

Hey all,
You have a meeting with Michelle McGrath, VP of Sales for Events at Gartner this afternoon.
I met with her already for a qualification meeting. Tee'd you up for the pitch.
A few things to note:

- I contacted Michelle after his 'request for more information' came in off of a lead gen campaign. He heard about us at a tech sales conference in in San Antonio.
- One interesting side note, Michelle and Deep are connected. In passing, Deep had mentioned he look more into the tool a few weeks ago.

Your coaches will have your exact meeting time and location.

More info below…

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Disco Call

Who's On the Call	Michelle McGrath
Job Title	VP of Sales, Gartner Events
LI Profile	Link to LI profile
Others on the call	N/A

Business Issue
Michelle requested to be contacted because she wants to evaluate our tool. Her team already uses the free tool for prospecting, and she'd like to understand more about the tool's value for lead generation.
Business
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 clients in over 13,000 distinct organizations. Through the resources of Gartner Research, Gartner Executive Programs, Gartner Consulting and Gartner Events, we work with every client 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 clients in 85 countries.

# of Reps: Merlin indicates 2885 reps at Gartner as a whole.

Who They Contact: They target CEOs, CMOs, Marketing Directors, Media Planners and Media Buyers across all verticals.

Qualed Budget?

Current Solutions: Their CRM is SFDC. Current tools/techniques include Hoovers and cold calling.

Premium Accounts: 398

Company Size: N/A