**Pre-Workshop**

* Identify Team IBM & client/customer sponsor
* Leverage information available from the Know My Client Practice, ICEM Practice; [HERE](https://ibm.seismic.com/app?ContentId=4fe7828c-34b6-4357-b3ba-ef4f08c953f3#/doccenter/5477419a-9474-4c51-94af-b442e9169fab/doc/%252Fdd98c5a3df-6b7c-1d77-6f07-d12e63954c78%252FdfOTRiYmU4NTQtNWY4NC03Y2QyLWZjYWUtOGIxYmFmZjkyZThk%252CPT0%253D%252CUm91bmR1cCBvciBzdW1tYXJ5%252Flf4d5bfede-4db1-407b-a7ed-aca2706957cf/grid/) Playbook [HERE](https://pages.github.ibm.com/csm-playbook/playbook/onboard/understand-client-it-landscape/).
* Gather insights about the customer & Understand the business strategy
  + **CSM Skills: Apply Industry/Business Knowledge**

<https://yourlearning.ibm.com/activity/PLAN-CABC861A1169>

* + **CSM Skills: Demonstrate Knowledge of Customer's Business**

<https://yourlearning.ibm.com/activity/PLAN-2193269FEE9B>

* Understand what was sold & why – research Gainsight, ISC, CADET (contract info for Diamond clients)
* Compile Analysts’ Forecasts and Trends information with regard to client’s business - Go to [CBV](https://v2.finlistics-vm.com/account-discovery).
* Research Use Cases and best practices with regard to client’s business [here](https://csm-usecase.dal1a.cirrus.ibm.com/)
* Go [here](https://w3.ibm.com/w3publisher/customersuccess/get-connected/community-connections) for Community of Practice Leaders

Propose to your customer by showing the slide**: Work together to solve your most critical business pain points**

IBM offers a complimentary half-day session to help you identify your greatest pain points and business challenges.

In this session, IBM experts will:

* Share the latest technology related to your industry and business pain points
* Facilitate an interactive design-thinking exercise to identify the most critical pain points and challenges that IBM technology can solve
* Outcome – A prioritized use case
* Next steps – Technology discovery and architecture of the solution

Share the Workshop Agenda with your customer

Use the PowerPoint to customize the agenda based on the duration of the workshop you intend to run.

Graphical user interface, text, application, email

Description automatically generated

**Workshop(s)**

1. **Choices based off of timeframe needed**

**1-Hour**

**INFORM**

**Duration: 15 min**

* **Brief introduction of IBM technology and fit**
  + **CSM Skills: Apply IBM Mission/Vision/Strategy and Organization**

<https://yourlearning.ibm.com/activity/PLAN-9246FDF361DE>

* **Align on your vision – confirm that the pre-workshop research correctly aligns with the customer’s strategy and pain points and how IBM technology can help.**

**COLLABORATE/EXPLORE**

**Duration: 20 min**

**Have them describe their challenges.**

**We want to develop or understand a strategy and a starting point for a journey to achieve their long-term goals.**

**Facilitate an interactive design-thinking exercise (whiteboard or Mural) to identify challenges and pain points, areas and roles impacted.**

* **What are some of the challenges you face in achieving your goals?**
* **Are there areas where your company wants to innovate?**
* **Are there areas where you want to grow as a business?**
* **What new markets do you want to reach?**
* **Are there areas where you can gain a competitive advantage?**

**\* Think about people/end-users whose experience you would like to improve:**

* **Customers**
* **External partners**
* **Internal stakeholders**

**\* Think about the problems your teams are facing and future opportunities:**

* **Customer satisfactions**
* **Churn or employee satisfaction**
* **Technical challenges**
* **Operational drag**

**\* Think about what is holding the company or the users back? And What are they struggling with?**

**PRIORITIZE**

**Duration 15 minutes**

**Take the results of the whiteboard exercise and prioritize**

**Highlight how IBM can help the team achieve their goal(s) with IBM technology or service offerings.**

**See if you can provide a use case(s) that can be addressed with IBM technology.**

**RECAP/PLAN**

**Duration 10 minutes**

**Recap the findings**

* Are there any roadblocks or risks we need to address?
* Do we have stakeholder buy-in? Funding?
* Go over possible next steps:
  + Present the IBM POV related to the use cases identified and prioritized
  + Demo solutions
  + Present case studies
  + Architecture workshop
  + Expert Labs Assessment

**2-Hours**

***INFORM***

**Duration: 15 min**

* **Brief introduction of IBM technology and fit**
  + **CSM Skills: Apply IBM Mission/Vision/Strategy and Organization**

<https://yourlearning.ibm.com/activity/PLAN-9246FDF361DE>

* **Align on your vision – confirm that the pre-workshop research correctly aligns with the customer’s strategy and pain points and how IBM technology can help.**

**COLLABORATE/EXPLORE**

**Duration: 30 min**

**Have them describe their challenges. What is the business landscape big picture?**

**We want to develop or understand a strategy and a starting point for a journey to achieve their long-term goals.**

**Facilitate an interactive design-thinking exercise (whiteboard or Mural) to identify challenges and pain points, areas and roles impacted.**

* **What are some of the challenges you face in achieving your goals?**
* **Are there areas where your company wants to innovate?**
* **Are there areas where you want to grow as a business?**
* **What new markets do you want to reach?**
* **Are there areas where you can gain a competitive advantage?**

**10-minute Break**

***ALIGN***

**Duration: 15 minutes**

**This activity helps the team to align challenges or problems the customer wants to address with the outcome your initiative should deliver for your business. It also helps to scope each initiative by aligning the desired business outcome to the people who will adopt or reject your solution and the experience you want to create or improve.**

**Directions**

**Populate the columns on the chart with the results from the previous discussion.**

**Align the difficulties and challenges with the team’s goals and the desired business outcome that would be delivered by achieving the goals.**

**Highlight how IBM can help** the team achieve each goal with our technology or service offerings.

**Determine the roles directly impacted by the effort. Who will work with the solution? Who will benefit when it is completed?**

**Name the process** you aim to improve for each initiative so you can vote on which to prioritize.

**Success**  
You have distinguished the discrete efforts required to deliver the goals for the team, the value that will be derived by completing each one, so that you can prioritize which efforts are most likely to benefits that are most valued by the team.  
  
**Tips**  
This activity is to help the team decide what effort to tackle first. When you start to discuss the details, you may define distinct efforts required to achieve one goal, so you list each effort in a separate row. On the other hand, addressing one challenge may lead to multiple benefits, those can be listed in the same row.

If multiple roles are impacted by the goal, they might be listed in separate rows and separate processes.

**\* Think about:**

**• Opportunities your company should pursue**

**• What have you never been able to solve?**

**• Threats to your company**

**• Other pain points**

**• Existing workflows/processes that need improving**

**• Areas where you can be disruptive or innovative**

**• Areas of the business that are important or growing**

**• Areas where the business could offer a competitive advantage?**

**\* Think about people/end-users whose experience you would like to improve:**

* **Customers**
* **External partners**
* **Internal stakeholders**

**\* Think about the problems your teams are facing and future opportunities:**

* **Customer satisfactions**
* **Churn or employee satisfaction**
* **Technical challenges**
* **Operational drag**

**\* Think about what is holding the company or the users back? And What are they struggling with?**

***PRIORITIZE***

**Duration 20 minutes**

**Take the results of whiteboard/Mural exercises and prioritize.**

**Purpose**

When a team has limited time or resources, it is important to prioritize initiatives that will deliver value aligned to your goals.

**Vote**  
(3 votes for each team member)

First: Vote on the initiative that will deliver the most business value based on the information collected in previous activities.

Second: Vote on how easy it is for your team to deliver the solution. Think about:

   - other teams or parties who might block your way

   - your ability to access to data

   - external regulations or controls

   - lack of executive support

   - etc.

Third: Vote on which initiatives would you most like access to IBM's expertise and offerings. Mark those with a star.

**Tips**

* Review the list to see if you have initiatives that are very similar to one another and might "split the vote." If you have no clear winners, review your list and see if some use cases should be grouped.
* What you choose to progress depends on what you value and how much. Sometimes a "no-brainer" is the clear winner, or you might decide a "big bet" is worth the effort, because of the value it will bring.
* Be sure to ask: Why solve this problem? Is it worth solving? What is the motivation?

**\* Think about:**

**Value to the Business**

**Consider the following areas for your company:**

**• user impact**

**• enable business innovation**

**• improve**

**• agility**

**• profit, cut costs**

**• competitive advantage**

**• company survival**

**\* Think about: Ease of Delivery**

**Consider the following areas for your company:**

**• business feasibility**

**• organizational capability**

**• ability to go to market**

**• legal / regulatory implications**

**• urgency of the business challenge**

**• team availability**

**Highlight how IBM can help the team achieve each goal with IBM technology or service offerings.**

***DESCRIBE***

**Duration 15 minutes**

**Describe a Use Case or Use Cases**

**Purpose**

Capture your intention and define your initiative on one card to keep the team focused as you move forward.

**Directions**  
Create a definition for each use case the team selects to pursue. Grab the results from the Prioritization board. Clarify and add detail as needed.

Collaborate around these items:

* We would like to address these problems or challenges - GOAL
* We want to achieve – BENEFIT
* Doing this will impact people in these roles – ROLE
* We are interested in exploring tech opportunities - TECHNOLOGY

***RECAP/PLAN***

**Duration 15 minutes**

**Recap the findings**

* Are there any roadblocks or risks we need to address?
* Do we have stakeholder buy-in? Funding?
* Go over possible next steps:
  + Present the IBM POV related to the use cases identified and prioritized
  + Demo solutions
  + Present case studies
  + Architecture workshop
  + Expert Labs Assessment
  + Present a possible Roadmap

**3-Hours**

***INFORM***

**Duration: 30 minutes**

* **Brief introduction of IBM technology and fit**
  + **CSM Skills: Apply IBM Mission/Vision/Strategy and Organization**

<https://yourlearning.ibm.com/activity/PLAN-9246FDF361DE>

* **Align on your vision – confirm that the pre-workshop research correctly aligns with the customer’s strategy and pain points and how IBM technology can help.**

***COLLABORATE***

**Duration: 15 minutes**

**Have them describe their challenges. What is the business landscape big picture?**

* **What are some of the challenges you face in achieving your goals?**
* **Are there areas where your company wants to innovate?**
* **Are there areas where you want to grow as a business?**
* **What new markets do you want to reach?**
* **Are there areas where you can gain a competitive advantage?**

***EXPLORE***

**Duration: 40 min**

**We want to develop or understand a strategy and a starting point for a journey to achieve their long-term goals.**

**Facilitate an interactive design-thinking exercise (whiteboard or Mural) to identify challenges and pain points, areas and roles impacted plus prioritize pain points.**

**Mural Categories include:**

**Things Driving Your Company - What are the strategic initiatives that are driving your organization? What are some of the challenges you face in achieving your goals?**

**Things Holding Your Company Back**

**Barriers in Your Company’s Way**

**Where Do You Want Your Company to Be in 2 Years**

* **areas where your company wants to innovate**
* **areas where you want to grow as a business**
* **new markets you want to reach**
* **areas where you can gain a competitive advantage**

**Purpose**

The aim of the following activities is to get an overview of your challenges and then delineate them into discrete and specific initiatives that you can tackle with IBM. We want to develop a strategy and a starting point for a journey to achieve your long-term goals. Before we align, categorize, or prioritize, we want to understand the big picture so we can begin to capture your goals and understand them in context.

**Directions**

Work for a few minutes in silence to capture your thoughts. Use the sticky notes to share your long term goals, your team or company's strengths, internal difficulties and external challenges.

In each category, group notes that are similar and label them with a summary title, if needed.

Review the input of the team and discuss and clarify so that everyone understands each individuals input.

**Success**

You understand and have captured

the client's motivation to work with IBM

what they want to achieve

context related to what is driving them

**Tips**

**Be specific and clear with what you capture.** Be brief but write enough that you will be able to remember the intent later. There should be enough detail that you can explain the team's work to a new person or partner who might join the team later or someone you need to whom you need to present the team's work.

**Populate the board before the session** with what you know individually or as a team. Use that as a starting point for conversation and add clarity and details in the session.

**15-minute break**

***ALIGN***

**Duration: 30 minutes**

**Document**

**Chart, treemap chart

Description automatically generated**

**Explore pain points, challenges, or problems your team wants to address with the outcome your use case should deliver for your business.**

**Scope each use case by aligning the desired business outcome to the people who will adopt or reject your solution and the experience you want to create or improve.**

**Directions**

**This activity helps the team to align challenges or problems the customer wants to address with the outcome your initiative should deliver for your business. It also helps to scope each initiative by aligning the desired business outcome to the people who will adopt or reject your solution and the experience you want to create or improve.**

**\* Think about:**

**• Opportunities your company should pursue**

**• What have you never been able to solve?**

**• Threats to your company**

**• Other pain points**

**• Existing workflows/processes that need improving**

**• Areas where you can be disruptive or innovative**

**• Areas of the business that are important or growing**

**• Areas where the business could offer a competitive advantage?**

**\* Think about people/end-users whose experience you would like to improve:**

* **Customers**
* **External partners**
* **Internal stakeholders**

**\* Think about the problems your teams are facing and future opportunities:**

* **Customer satisfactions**
* **Churn or employee satisfaction**
* **Technical challenges**
* **Operational drag**

**\* Think about what is holding the company or the users back? And What are they struggling with?**

**Directions**  
**Copy and paste the sticky notes from above** into the first three columns.

**Align** the difficulties and challenges the teams goals to address them and the desired business outcome that would be delivered by achieving the goals.

**Highlight how IBM can help** the team achieve each goal with our technology or service offerings.

**Determine the roles** that will be directly impacted by the effort. Who will work with the solution? Who will benefit when it is completed?

**Name the process** you aim to improve for each initiative so you can vote on which to prioritize.

**Success**  
You have distinguished the discrete efforts required to deliver the goals for the team, the value that will be derived by completing each one, so that you can prioritize which efforts are most likely to benefits that are most valued by the team.  
  
**Tips**  
This activity is to help the team decide what effort to tackle first. When you start to discuss the details, you may define distinct efforts required to achieve one goal, so you list each effort in a separate row. On the other hand, addressing one challenge may lead to multiple benefits, those can be listed in the same row.

If multiple roles are impacted by the goal, they might be listed in separate rows and separate processes.

***PRIORITZE***

**Duration: 20 minutes**

**Prioritize use cases that will deliver value aligned to your goals.**

**Highlight how IBM can help the team achieve each goal with IBM technology or service offerings.**

**\* Think about:**

**Value to the Business**

**Consider the following areas for your company:**

**• user impact**

**• enable business innovation**

**• improve**

**• agility**

**• profit, cut costs**

**• competitive advantage**

**• company survival**

**\* Think about: Ease of Delivery**

**Consider the following areas for your company:**

**• business feasibility**

**• organizational capability**

**• ability to go to market**

**• legal / regulatory implications**

**• urgency of the business challenge**

**• team availability**

**Purpose**

When a team has limited time or resources, it is important to prioritize initiatives that will deliver value aligned to your goals.

**Vote**  
(3 votes for each team member)

First: Vote on the initiative that will deliver the most business value based on the information collected in previous activities.

Second: Vote on how easy it is for your team to deliver the solution. Think about:

   - other teams or parties who might block your way

   - your ability to access to data

   - external regulations or controls

   - lack of executive support

   - etc.

Third: Vote on which initiatives would you most like access to IBM's expertise and offerings. Mark those with a star.

**Tips**

* Review the list to see if you have initiatives that are very similar to one another and might "split the vote." If you have no clear winners, review your list and see if some use cases should be grouped.
* What you choose to progress depends on what you value and how much. Sometimes a "no-brainer" is the clear winner, or you might decide a "big bet" is worth the effort, because of the value it will bring.
* Be sure to ask: Why solve this problem? Is it worth solving? What is the motivation?

***DESCRIBE***

**Duration 15 minutes**

**Describe a Use Case or Use Cases**

**Purpose**

Capture your intention and define your initiative on one card to keep the team focused as you move forward.

**Directions**  
Create a definition for each use case the team selects to pursue. Grab the results from the Prioritization board. Clarify and add detail as needed.

Collaborate around these items:

* We would like to address these problems or challenges - GOAL
* We want to achieve – BENEFIT
* Doing this will impact people in these roles – ROLE
* We are interested in exploring tech opportunities - TECHNOLOGY

***RECAP/PLAN***

**Duration 15 minutes**

**Recap the findings**

* Are there any roadblocks or risks we need to address?
* Do we have stakeholder buy-in? Funding?
* Go over possible next steps:
  + Present the IBM POV related to the use cases identified and prioritized
  + Demo solutions
  + Present case studies
  + Architecture workshop
  + Expert Labs Assessment
  + Present a possible Roadmap

**Progress the prioritized use case**

* Are there any roadblocks or risks we need to address?
* Do we have stakeholder buy-in? Funding?
* Our next steps are:
  + Present the IBM POV related to the use cases identified and prioritized
  + Demo solutions
  + Present case studies
  + Architecture workshop
  + Expert Labs Assessment
* Present roadmap (including forecast deployment date)

**4-Hours**

***INFORM***

**Duration: 30 minutes**

* **Brief introduction of IBM technology and fit**
  + **CSM Skills: Apply IBM Mission/Vision/Strategy and Organization**

<https://yourlearning.ibm.com/activity/PLAN-9246FDF361DE>

* **Align on your vision – confirm that the pre-workshop research correctly aligns with the customer’s strategy and pain points and how IBM technology can help.**

***COLLABORATE***

**Duration: 15 minutes**

**Have them describe their challenges. What is the business landscape big picture?**

* **What are some of the challenges you face in achieving your goals?**
* **Are there areas where your company wants to innovate?**
* **Are there areas where you want to grow as a business?**
* **What new markets do you want to reach?**

***EXPLORE***

**Duration: 40 min**

**We want to develop or understand a strategy and a starting point for a journey to achieve their long-term goals.**

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**Barriers in Your Company’s Way**

**Where Do You Want Your Company to Be in 2 Years**

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**Purpose**

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**Tips**

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**15-minute break**

***ALIGN***

**Duration: 30 minutes**

**Document**

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**Directions**

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**\* Think about:**

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**• What have you never been able to solve?**

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**• Other pain points**

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***PRIORITZE***

**Duration: 20 minutes**

**Prioritize use cases that will deliver value aligned to your goals.**

**Highlight how IBM can help the team achieve each goal with IBM technology or service offerings.**

**\* Think about:**

**Value to the Business**

**Consider the following areas for your company:**

**• user impact**

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**• improve**

**• agility**

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**• competitive advantage**

**• company survival**

**\* Think about: Ease of Delivery**

**Consider the following areas for your company:**

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**• urgency of the business challenge**

**• team availability**

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When a team has limited time or resources, it is important to prioritize initiatives that will deliver value aligned to your goals.

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**Tips**

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* Be sure to ask: Why solve this problem? Is it worth solving? What is the motivation?

***DESCRIBE***

**Duration 15 minutes**

**Describe a Use Case or Use Cases**

**Purpose**

Capture your intention and define your initiative on one card to keep the team focused as you move forward.

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Collaborate around these items:

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* We want to achieve – BENEFIT
* Doing this will impact people in these roles – ROLE
* We are interested in exploring tech opportunities – TECHNOLOGY

***SHOW ME A DEMO***

**Duration: 45 min to an hour**

* Present a demo that best fits the customer’s pain point

***RECAP/PLAN***

**Duration 15 minutes**

**Recap the findings**

* Are there any roadblocks or risks we need to address?
* Do we have stakeholder buy-in? Funding?
* Go over possible next steps:
  + Present the IBM POV related to the use cases identified and prioritized
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  + Present case studies
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  + Expert Labs Assessment
  + Present a possible Roadmap

**Progress the prioritized use case**

* Are there any roadblocks or risks we need to address?
* Do we have stakeholder buy-in? Funding?
* Our next steps are:
  + Present the IBM POV related to the use cases identified and prioritized
  + Demo solutions
  + Present case studies
  + Architecture workshop
  + Expert Labs Assessment
* Present roadmap (including forecast deployment date)