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Charmian Grove

A Human Centred Design Approach for Sales

Utilising a Client-centric Framework to Build Sales

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A HUMAN CENTRED DESIGN APPROACH FOR SALES

UTILISING A CLIENT-CENTRIC FRAMEWORK TO BUILD SALES

A Human Centred Design Approach for Sales:
Utilising a Client-centric Framework to Build Sales
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ABOUT THE AUTHOR

Charmian Grove is a strategic sales and pursuits coach for one of the largest and most successful consulting firms in the world. She uses Human Centred Design principles to help sales teams build a deeper understanding of their clients, coaching them to develop more successful proposals, in order to solve their clients' most complex challenges.

She has designed and facilitated virtual sales training for a national audience, covering content ranging from basic best sales practices, opportunity origination and development, through to creating winning oral presentations.

She is recognised for excelling at bringing disparate groups together from the corporate and public sector to collaborate and create a shared vision and actions for the future, using human-centred design workshops.

Before working for a top-tier consulting firm in Australia, she led commercial sales teams at Getty Images in New York and ran her own Singapore-based commercial photo agency.

PREFACE

The way we understand and sell to clients continues to evolve as the world changes at an accelerated pace. The onset of the Covid-19 pandemic has added another layer of complexity in terms of how we interact with people and build empathy, often in a virtual space. Digital transformation is making work more efficient but is also driving new client needs and challenges, requiring better tools for us to understand our clients more deeply.

Businesses, sales teams and individuals need an enhanced toolkit, that can be leveraged in a virtual space, to strengthen client relationships and sense any opportunities early. The most successful performers can rapidly ingest client information and put themselves in their clients' shoes to recognise their needs and find the most desirable and innovative solutions for their clients.

This book will teach you how to use a design-thinking-led framework to build an action plan for successfully pursuing these opportunities. Starting through a lens of what is desirable to your client, this method is a proven way to increase your win rate on deals.

1 WHAT IS HUMAN CENTRED DESIGN?

1.1 THE ORIGINS OF HUMAN CENTRED DESIGN

Human Centred Design (HCD) is a creative approach to problem solving, traditionally for designers, where we can use a process that is empathetic to the people we are designing for, to solve a problem. The approach and its use have now extended well beyond designers, as more and more people realise the high value and importance of empathy and collaboration to generate more innovative ideas, tailored to the end user.

HCD provides us with a set of designer's tools, accessible to everyone, that can be easily used in a collaborative setting, virtual or otherwise, to adopt a **user centric** or in this case **client centric** mindset, to put ourselves in their shoes and drive towards an outcome that is first and foremost desirable to them. By starting at the entry point of what our client wants, we avoid the common pitfall of jumping straight into a solution mindset of what we want to sell to our client, without thinking deeply and honestly about their challenges, pain points, needs and future aspirations. When we take the time to gather these insights, we can then bring the client's desires together with what is technically viable and economically feasible and then finally take steps to find an appropriate and innovative solution, tailored to their needs.

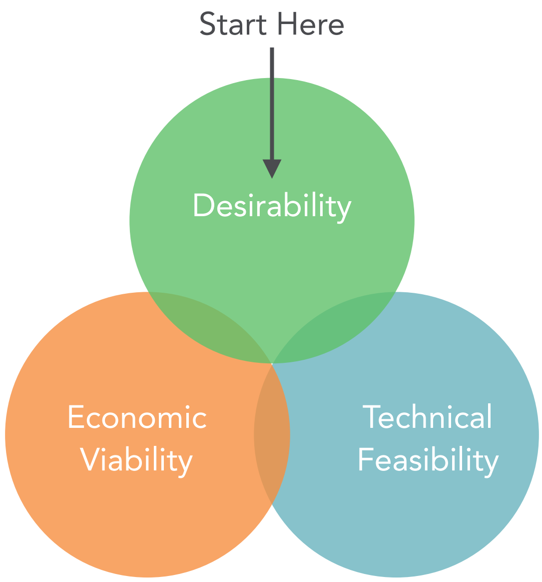

Figure 1.1 The Sweet spot for customer needs

In this book, I will show you how applying this approach, using a series of established foundational steps, will help you elevate your relationships and understanding of your clients to offer them something inspiring, innovative and distinct to solve even their most complex challenges.

> *Human Centred Design lets people find the sweet spot of feasibility, viability and desirability while considering the real needs and desires of people.*
>
> – IDEO's Tim Brown

This methodology has also proven successful as a way of removing potential biases that can naturally occur within a more traditional design or decision-making process, freeing people up from their established mindsets or the way things have always been done to embrace more blue sky thinking, by bringing in inspiration (in any format) to consider future possibilities. Although design thinking embraces a linear structure, this allows participants not to be distracted by the process or get weighed down in certain areas by providing them with guardrails, allowing them to think creatively and embrace limitless possibility. It provides a way of solving problems that is accessible and comfortable to all people, no matter their role, from CEO to account staff at all levels.

1.1.1 WHO IS USING HUMAN CENTRED DESIGN AND WHY?

Companies of all sizes globally have adopted this approach to problem solving, embracing this collaborative way of working to build empathy for clients and leading to a greater understanding of their clients' needs. What do Apple, PepsiCo, Microsoft, Nike, Samsung, Bank of America and Toyota have in common? They have all embraced HCD as a method for solving a challenge and creating something that has given them an edge over their competition. Customers today are vastly more informed and more demanding than ever, with information never more than a click away. These organisations have adopted the useful scaffolding of HCD to conduct low fidelity, rapid prototyping and testing, so they can quickly modify and retest their ideas, based on their client's input, to ensure they are accurately addressing the client's challenge, or unmet need, or perhaps to open up a whole new area of opportunity for them.

If you are interested in knowing more about why Human Centred Design has been so successful for solving problems for organisations like these, I recommend the following Harvard Business Review article Why Design Thinking Works.

1.1.2 THE FOUR STAGES OF THE DOUBLE DIAMOND PROCESS

The framework for using HCD follows four stages that can be referred to as Discover, Define, Develop and Deliver. The double diamond process has been used globally by designers and non-designers alike to work through two stages of divergent and convergent thinking. Divergent thinking encourages us to think broadly and deeply about an issue, then we narrow our thinking down into more focused actions during the process of convergent thinking. We will overlay this process of divergent and convergent thinking to our desired outcome of better understanding our clients and their needs twice throughout this book.

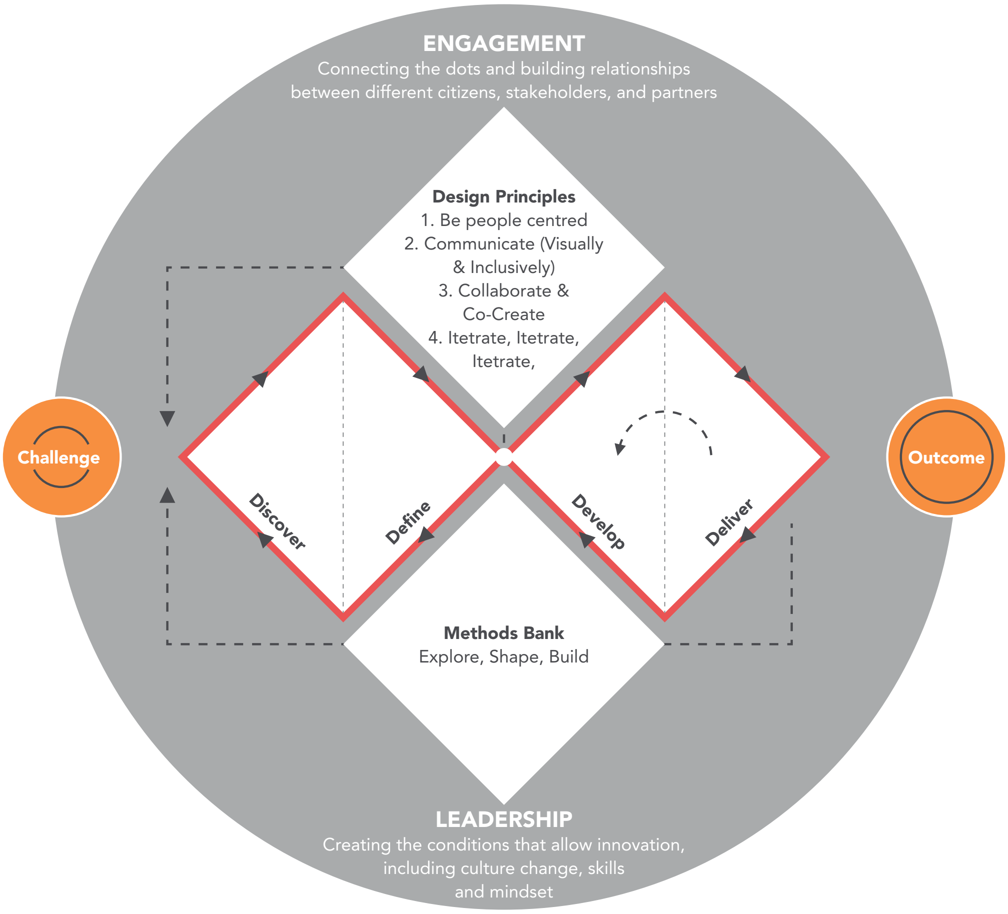

Figure 1.2 The Design Council's Double Diamond

Although there are other terms and adaptations of the model available, I have chosen to use these labels and this visual as a reference for its simplicity. However, I encourage you to explore others and find one that works for you or even design your own! For example, one of my colleagues adds a circle to represent the environment around the entire process, because he felt that was of particular value for a client project and needed to be kept at the forefront of everyone's mind throughout the process.

In the Discover stage, we will build our understanding of our client fundamentals, exploring their challenges, their future aspirations and other external forces impacting them, putting ourselves in their shoes and using the knowledge we have gained through our relationships, in addition to other tools, to truly understand, rather than assume we know what their problems or challenges are. We will also consider our client relationships at an individual level, identifying key influencers and decision makers and what their personal agendas may be. Quite simply, this is where we build empathy for them, which will reinforce to them how valuable to us they are as clients.

During the Define stage, we will take these insights and client knowledge and focus on the challenge, problem or pain point we are looking to help the client solve. This is a critical step to ensure that the problem we are helping them solve is not based on our assumptions, but viewed through their lens.

In the Develop stage, we will enter the second phase of divergent thinking, bringing the outside in to inspire us with the possibilities of the future, drawing on expertise and a range of opinions to help us build our solution to the client's challenge. This section also encourages us to think about something the client may not have considered or to explore an innovation or idea that may surprise and delight them.

In the final stage of Deliver, we will create an offering for the client, testing and iterating it along the way, so that we provide them with something innovative, distinct and most relevant to their needs. In our process, we will challenge our ideas at regular intervals, asking ourselves if we have something that will truly resonate with the client and be distinct from our competitors.

1.1.3 A NOTE ON COLLABORATION

In this book you will find a lot of references and recommendations to work through the process in the format of a workshop. I am using the word very generically. It could be three participants or it could be thirty. You may work together in person or virtually. What is important is that you bring together diverse minds and different perspectives, particularly for the stages where you want divergent thinking, in order to come up with a breadth of ideas.

Collaboration allows you to listen to other people's ideas and perspectives and to challenge one another's thinking. It allows you to bring in people from a cross-section of your business. For example, it gives you the opportunity to gain input and insights from salespeople, product designers, project managers and a range of roles and skill sets all while putting the client at the centre of your thinking.

Using a whiteboard allows you to create a visual of the ideas and rapidly refine them, move them around and cluster like ideas together as a group. You can work fast and efficiently. Messy is okay!

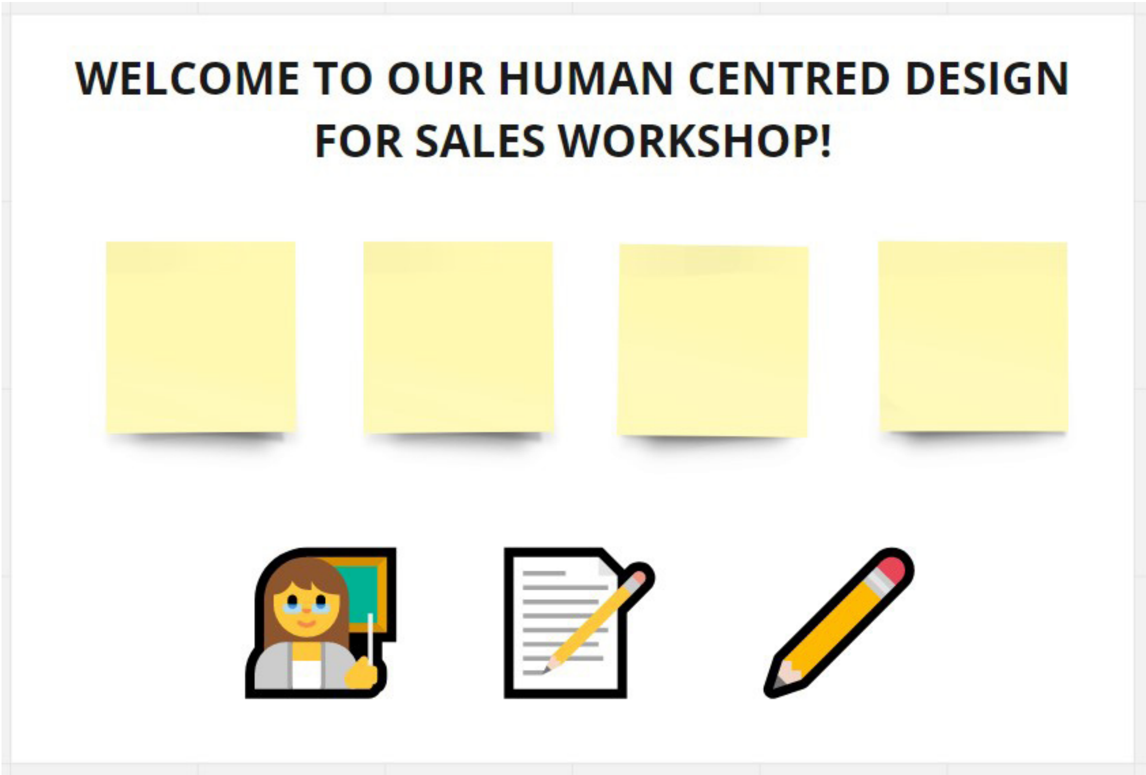

Figure 1.3 Example of a virtual whiteboard

Activities

1. Identify an example of where you have seen a human centred approach being used. What were the benefits?
2. Think of a situation where you may have benefitted from a more empathetic approach with a client. Why would it have improved the interaction?
3. Consider the way you and your team work together. What is the best way for you to collaborate?

2 DEVELOPING A DEEP UNDERSTANDING OF YOUR CLIENT'S CURRENT STATE

2.1 YOUR CLIENT'S CHALLENGES AND OPPORTUNITIES

In the first part of this process, we want to take a close look at the problems, challenges and opportunities facing the client, through their lens. We do this by asking ourselves if we truly have a precise understanding of what's impacting their business, which will then allow us to develop a viewpoint on how they will define value in terms of the solution we propose.

An example of this might be a client with outdated technology needing to upgrade to a cloud-based solution and not having the skill set within their team to work out what they will need or how they will implement it. Perhaps it's a business that has been undergoing disruption and needs to change their model in order to remain competitive. Maybe it is a company that has gone through a major transformation, but their staff have not been presented with an appealing narrative and are resisting the change.

Using our HCD approach I recommend you gather your colleagues or other brains trust, who have knowledge of the client (or maybe it is just you) and give yourself ten minutes to write down as many challenges you can think of. Think broadly and deeply and get as many ideas down as possible in the set time frame. This is a step in your process of divergent thinking.

Human centred design is an iterative process and I have some recommendations on how you can do this successfully. Using a physical or a virtual whiteboard, jot one idea down per Post-it note. When your time is up, cluster any similar ideas together. We can call this 'synthesising' and those clusters can be prioritised and used to identify key themes.

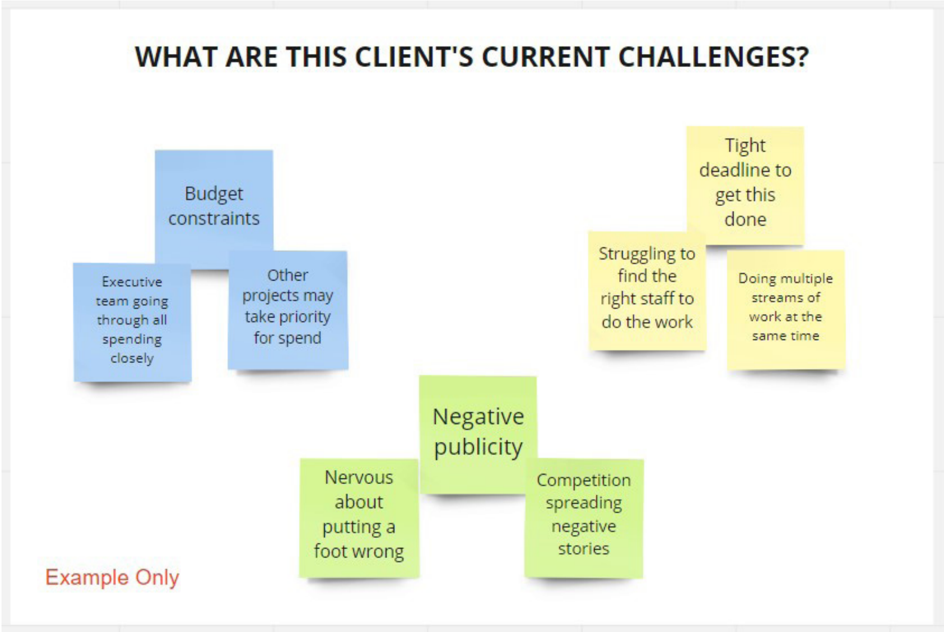

Figure 2.1 Example of synthesising themes

You may need a prompt for this activity to get you started. One popular method is to perform what is sometimes referred to as a STEEPLE analysis. Ask yourselves what external factors may be impacting your client in relation to the following:

Figure 2.2 Steeple Factors

Once you have your synthesised your groups of problems, challenges and opportunities, it is time to dig deeper by looking at them through the client's lens. Ask yourself why these matter to your client and what the desired outcome or future state might look like for them. Use more Post-it notes (perhaps in a different colour) to separate these future aspirations.

Now you should consider things you know that the client might not have thought about. For example, maybe you know from experience with other clients that changing a certain technology or process could prompt some staff resistance or unease because it could potentially mean team reductions or changes to their role. Do you know if the staff have the technical maturity to deal with this change? Is this an opportunity for your company to help the client?

After going through these steps, you may find you have more questions than answers. It is time to stop and reflect. Do you know the client as well as you think you do? If you need more information, create an action to set up a meeting with the client. Ask them what keeps them up at night and find the answers to your questions. In most cases, clients are grateful for someone who is genuinely interested in hearing about their business and are more than willing to share information.

2.1.1 STAKEHOLDERS, DECISION MAKERS AND INFLUENCERS

These are the people who will directly or indirectly impact whether you can close a deal. It only takes one loud voice in a room to derail your sales strategy, so it is important to take the time to consider your client relationships and their perception of you and your company.

There are dozens of tools and templates available online that can help you map out who these key people are and I encourage you to find one you are comfortable with. It does not need to be complicated and this part of the Discover process can be done in a simple table.

Make a list of the stakeholders, decision makers and influencers, by name or by their role in the organisation. For example, if you do not know the name of the CFO but you know a deal will require their sign-off, list 'CFO' and make an action to find out their name.

Think about their role in the decision-making process. How much influence will they have over the sale? Rank them or allocate them a percentage.

Next, you need to think about their personal agenda. This is important. By understanding someone's personal agenda within the organisation or their ambitions for the business, it will help us develop a proposal that will truly resonate with them. Does the finance manager have ambitions to be CEO? Can you facilitate helping them network with peers or make some helpful introductions?

Consider what their attitude is towards your business. Have there been any previous interactions? Were they positive, negative or neutral?

Now add to your list of actions to be taken. For this section, it could be just be that you need to ask your client more detailed questions to understand their ambitions more thoroughly or you may have some more work to do if there is a detractor among them and you need to identify a way to change their perception of your company. If you know what is going to resonate with them, you should be able to find an appropriate action. For example, if you know that a person has ambitions to upgrade their team's skillset in a certain area, you may have a thought-leadership or industry article you can share with them.

WHO ARE THE CLIENT STAKEHOLDERS, DECISION MAKERS AND INFLUENCERS?

Name	What is their role?	What do we know about their goals?	Who has a relationship?	How do they feel about our company?	What action can we take to build this relationship?
Jane Smith	CEO	Wants to be known as the leader in this industry	Previous sales manager	Really liked the sales manager and hasn't met the new one.	Organise a meeting with the new sales manager to ask what they liked about working with the previous manager and how we can support them to become industry leader.
John Brown	Procurement	Reduce operational costs	No one	Unknown	Research John's online profile Ask for an introduction from Jane to understand more about his priorities.

Example Only

Figure 2.3 Sample Stakeholder Analysis

2.1.2 KNOWING YOUR CLIENT'S KEY DECISION FACTORS

For some successful businesses, you will find that a high portion of their revenue comes from recurring business, whether that is through additional purchases of products and services, upgrades or subscription or license renewals. This reason alone is why developing a thorough understanding of your client is critical to success.

Generally, we find a client will make decisions based upon the following factors:

Relationship - what relationships do you have with the client?

Brand and Reputation - how does the client perceive your business?

Team - what are your individual staff members like to work with and do they have the right skills?

Solution - do you have the product or service that will solve their challenge?

Price - are you price competitive, do you offer commercial flexibility or have you built value to justify your price?

Presentation - how do you come across to the client and would they want to work with you?

Activities

1. Think about your team. Do you have the depth and breadth needed to meet your client's needs? Are there gaps you need to fill? Are there team members who could fill these gaps with some coaching or training to uplift their capability?
2. Make a list of actions you can undertake to build your brand in a way that will resonate with your clients.

3 UNDERSTANDING YOUR CLIENT'S FUTURE ASPIRATIONS

3.1 INDIVIDUAL AGENDAS VERSUS COMPANY AMBITIONS AND GOALS

You have already taken a look at the individual agendas of your client at the stakeholder level and possibly identified some actions you need to take to know more, but we also need to consider the goals of the company. Through these steps you are well on your way to building a better understanding of your client through the actions you have outlined and will be putting yourself in a stronger position with them.

Engage with people who know the company and use them as your brains trust again for this section. Grab your white board and Post-it notes. It is time to go through divergent thinking again. Set a timer for ten minutes and write down what you believe their company goals and ambitions are. One idea per Post-it note again is the rule.

Often a company will have a mission statement on their website that may give you clues and a starting point for some questions you might want to ask in order to find out more.

Do they have the ambition to be a leader in their sector? Do they have a goal to reduce their operational costs? Do they need to undergo some form of digital transformation to remain competitive? Do you understand their appetite for changing their product or upgrading their technology and their timeline to achieve their ambitions?

Synthesise the ideas into groups of themes again and identify the ones that are the client's biggest priority or the ones that your company may be able to help them achieve.

Successful companies know that they need to reinvent and innovate to sustain long-term growth, which puts their leaders under pressure to continuously evolve. How they get there can offer you the potential to become a trusted advisor and help them achieve their goals.

Think of as many of their goals as possible in ten minutes and get the ideas down. Cluster any similar themes and ideas together.

Figure 3.1 Sample Client Company Goals

3.1.1 BECOMING PART OF YOUR CLIENT'S LONG TERM STRATEGY

Now we have taken time to reflect on our client's goals and aspirations, we can start to think about where your organisation might play a role in making it a reality.

Using the key themes you have identified (or maybe just one) consider how you can use your expertise, engage your specialists or bring your experience to the forefront. Do you have what they need to realise their ambitions?

From a technology perspective: Do they have the technology, software, licenses, hardware to make this a reality?

From a people perspective: Do they have the right expertise in house and are their people in the right mindset to make this happen? Do they want to do it? Is the timing right?

From a financial perspective: Do they have the budget, the approvals, the investment to fund this change or project?

As you work through these questions, you will be tempted to start moving straight into solution mode. Start thinking about what services or products your organisation offers that could align with these needs. Note these ideas, but do not let yourself get too deep into the details just yet.

Later in this book you will be challenging these solution ideas, so it is important you do not feel so attached to the ideas that you can't let them go or change them.

3.1.2 BRINGING OUTSIDE EXPERTISE IN

Using external examples, case studies, future visions, articles by thought leaders, podcasts, Ted Talks and other stories is a great way to inspire creative thinking. Do some research and see if you can find something that will get your team thinking about the future of what is possible for this client. What can you do to inspire them?

Bringing the outside in will show the client that you are not just looking out for yourself and your company, but are investing in their success.

Remember that one of our objectives of this process is to bring the client something that will surprise and delight them, be innovative and is different from your competitors.

Activities

1. Identify your top five clients or prospects. How well do you understand their company goals and ambitions for the future?
2. Prioritise the list and schedule some meetings to ask more about their business or schedule time to do online research.

4 STRENGTHS AND WEAKNESSES

4.1 YOUR EXPERIENCE

Unless you are a start-up (and even then this may apply), you will have experience with the product or service that you provide. Think about the best experience you have ever provided to a client, then think about the worst. What worked? What didn't work? What would you keep? What would you change?

Write them all down again (use a whiteboard and Post-it notes).

Plot them in sections that represent what you want to continue doing, stop doing or what needs to be adapted or changed. A sample structure to use could be the titles 'Rose', 'Bud', 'Thorn'.

Are there areas you need to take action on now to elevate and improve your offering?

Having recent case studies, client testimonials and maybe even videos should form part of your sales toolkit. What you use and how creative you want to get will depend on the experience you want your client to have when they interact with you.

These materials should fit with the narrative you want to convey to your clients. A good narrative should be engaging and most importantly memorable. It is worthwhile getting expert advice to build the narrative. Having a good story to tell can serve multiple purposes, including giving your client a sense of what it would be like to work with you.

Once again, it is vital that the story you tell and the experience you highlight touches on what is important to your key stakeholders and fits with their company ambitions, in order to be effective.

4.1.1 YOUR COMPANY'S BRAND

What is the client's perception of you, your team and your organisation? If you have just completed a sale or service where the client had a great experience, you have the opportunity to develop the relationship and your brand further. Ask your client why they chose your company? How was it different or superior to the competition? If it was positive you could consider asking for a client testimonial or ask if they would be willing to have a client-to-client call to talk about their experience with your company.

Make a list of your product, your service and your company's strengths and weaknesses. Remember, you want to be thinking of them through the client lens, not where you see your strengths and weaknesses. Compile a list of questions the client may have about your offering. Is there an opportunity to strengthen your brand with them in certain areas?

Think through any unresolved issues that may be impacting your brand. Are there actions that need to be taken to rebuild trust with your client? Consider what your competition might be saying to the client. What would their narrative be?

Never ignore an unresolved problem. Some of the best learnings will come from going back to a client that you have lost and asking the right questions. This is the primary way to gain valuable feedback that can help you improve and iterate on your pitch, your product, your service and to better understand what your client cares about. This step is often overlooked because no one likes to hear negative feedback, but it should be viewed as an opportunity to build the relationship and trust with your client.

4.1.2 YOUR COMPANY'S COMPETITORS

Similar to mapping your key stakeholders, there are a lot of resources available to help guide you when you need to perform a competitor analysis. Keep it simple initially. I recommend a simple table with some key questions you need to answer.

Once again, it is worthwhile to engage any colleagues or other contacts (perhaps you know former employees of the competitor?) and work together. Have your participants write down as many ideas (on a whiteboard or with Post-it notes), then when the time is up (15 minutes should be plenty, cluster them into similar ideas and label them. Highlight in some way the competitors who you see as the biggest threat, but do not ignore the others. You never know when there is a company ready to disrupt an industry by offering something completely different, as we know from companies such as Uber and Airbnb.

The key questions you should ask yourself about your competitors are:

1. What makes you think they are a competitor? What signals have you seen that makes you think they are going after this client's business?
2. What are their strengths? If it's a product or service, why would it be considered a strength? Are they more established in the market place, do they have a team with great relationships or specialties or do they have a better brand or reputation?

3. What are their weaknesses? Perhaps the location of a team, a customer service centre or other factor gives you an advantage. What is it that matters to the client?

Refer back to the key decision factors we highlighted in 2.3 and compare these strengths and weaknesses in relation your competitors.

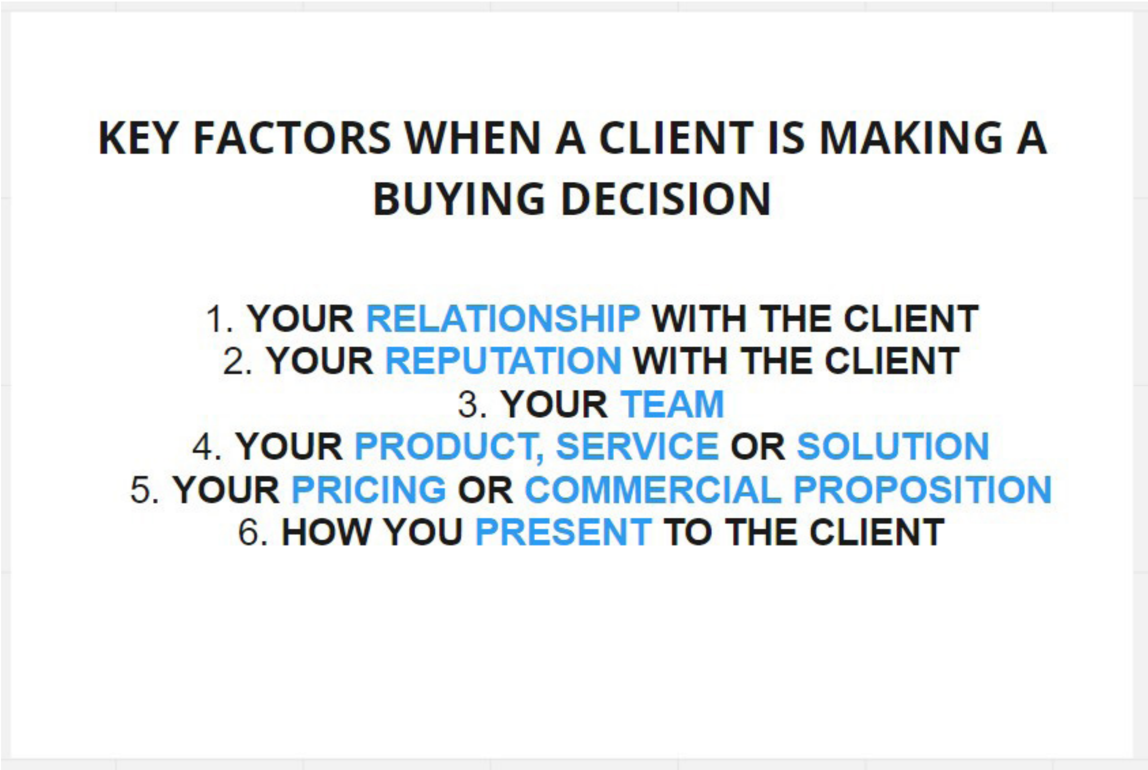

Figure 4.1 Client Buying Factors

A note on pricing. Do not be tempted to just default to saying your competitor offers a lower price! As experienced sales professionals you should already know the importance of building value around what you are selling, beyond price and I could write another entire book on it. Dig deep and think hard from the client perspective and try to identify what it is about the competition that differentiates them from you. If it is a race to the bottom on price, then you should consider whether this is work you should be bidding for or whether it may actually de-value your product or offering.

Once you and your team have made these notes and clustered them into similar ideas or themes, take a minute to challenge them. Ask yourselves whether the client really sees them as strength or weakness. You may even be able to prioritise them in order of importance to the client. Colour-coding can be a helpful tool to create a visual that you will remember.

The final step in this competitor analysis is to look at your strengths and weaknesses (in order of client priority if you have managed that step) and outline all the actions you could potentially take to strengthen your position against the competition. These actions may be big or small and at the end of this step someone on your team should have accountability and a deadline for making them happen. Think big, be innovative, there are no bad ideas. You can refine them and prioritise them within your pursuit strategy or action plan later.

If you have time or want to assign this task to someone else, perhaps a colleague who is familiar with the competition, a really worthwhile activity is to write a proposal from the competitor's perspective. If multiple people take on this activity, you can then share them back with your team, to see where they differ and where they align.

If you have trouble with this section or find it full of blanks, you need to create an action plan to find out more about your competitors.

There is enormous value in taking the time to look at your competition and what they offer from the client's perspective in order to identify areas where you may need to be prepared with a counter-argument or where you may need to take the time to consider ways to strengthen your position. One of these ways is to form an alliance or partnership, which we'll look at in the next chapter.

4.1.3 PARTNERSHIPS, EXISTING ASSETS AND SPECIALISTS

More frequently, vendors are realising the advantage of partnering with another organisation. Aside from being a valuable way to enhance your offering or overcome any weak spots, it can also be a great way to show a client your ability to build relationships and collaborate well.

Another way to strengthen your position can be to take something you have built or designed, something you might consider an asset, which has been positively received by a client. Could it be repurposed for another client (assuming there are no copyright limitations or similar restrictions)? Leveraging something that has worked well for another client is a great way to show how you can accelerate your work or help a client get to market faster, particularly if time is a driving factor for your client. Think broadly about how this could be done. Could you do some form of revenue share from an existing asset? Would this overcome any price hesitancy the client may be having?

In 3.3 we talked about Bringing the Outside In. Consider any specialists you may have. If you have people whose work has been well received by a client, is there a way you can bring them in to strengthen a proposal by showing their expertise or experience?

Synthesise these ideas into themes, then narrow them down to the ones that speak directly to the client need you are addressing. If you have something that is different from your competition this could end up forming one of your win themes.

4.1.4 THE PRODUCT, SERVICE OR SOLUTION YOU ARE SELLING

You and your company should already have a clear idea what your value proposition is for your clients. It should simply and clearly articulate the benefits to a customer of your product, service or solution and how it is uniquely differentiated from the competition. In a large organisation you may have different value propositions for different offerings. Since this process is to look at opportunities with a more client-centric point of view, I strongly encourage you to tailor your value proposition to your client.

Think about the insights you have already gathered from the work so far. For each section you should have an idea of what is important to your client, what their challenges or opportunities are and what is going to resonate with the key decision makers.

Make a list of your offerings or products that speaks directly to their needs. Is it distinctive to you, is it innovative, do you have the right team and experience to implement it?

If your offering can be customised you should think about what that might look like. Challenge yourself to make sure you are not offering something too far beyond what the client desires. You may find a downward trend in the work you are winning if you offer all the bells and whistles at great expense, but one of the client's key challenges is budget!

Activities

1. Make a list of examples where your product or service is in use and you can impress some of your other clients or prospective clients with.
2. Think about some of your favourite brands. Why do they appeal to you and what do they do that prompts you to take action and make a purchase?
3. What are some of the ways you have identified that you can actively enhance your product or service? Order them in terms of short term, medium term and long term goals.

5 ENSURING YOU ARE OFFERING SOMETHING UNIQUE

5.1 WHAT IS THE PROBLEM YOU ARE SOLVING FOR?

Now that you have a broad understanding of your client, their stakeholders, the competitive landscape and have looked closely at their needs and created associated actions to form your pursuit strategy, it is time to really zone in on the area where you are best positioned to help the client. Often the use of a 'focal question' or sometimes called a 'how might we' question can help keep you on track.

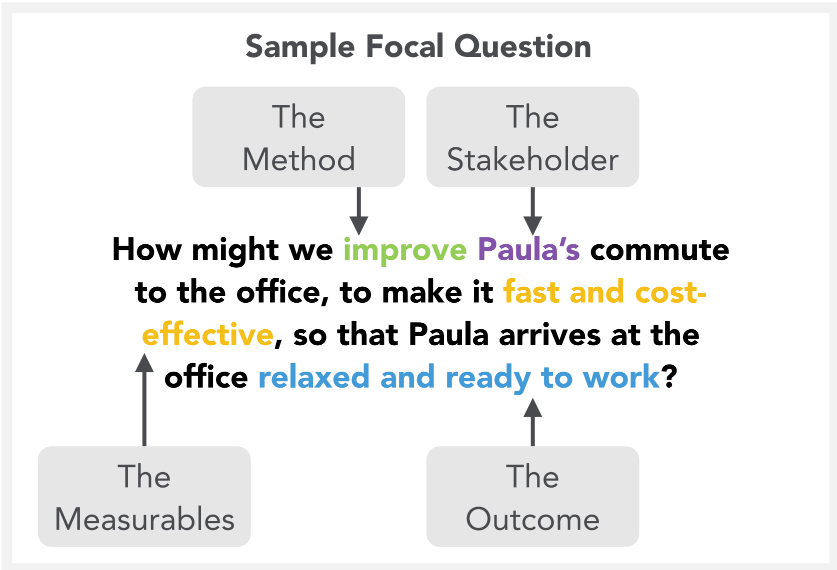

Figure 5.1 Example Focal Question

The outputs and key themes from sections 2 and 3 will help you create this focus.

Frame the focal question around the problem or challenge you are trying to solve for the client. If you are unsure, test the question by asking, 'if we can answer this question well, will the client have achieved their goal?'

If possible, you can test this focal question with your client. Then edit it if necessary, with their input. You can also work on this as a group. A large piece of paper on a wall or a virtual whiteboard works well. Use Post-it notes to swap ideas, phrases and words, until you have something you are satisfied with. Vote on it if necessary and do not fall into the trap of getting caught up wordsmithing. It is more important that you are aligned on the sentiment.

5.1.1 UNIQUE WIN THEMES

We are now entering the second stage of divergent thinking in our approach. It is time to think broadly about what you as an organisation can bring to the client to solve for the challenge or opportunity you identified in your focal question above.

A win theme should be a succinct idea that you and your company can bring to solve a client issue or help them bring an opportunity to life. It should be compelling, memorable and unique to your organisation. We are now going to go through an activity that will help you identify what those themes could be for you and your client, using the focal question.

Place your focal question in the centre of your whiteboard and spend ten minutes writing down as many ways as possible (one per Post-it of course) that you can help this client to get to their goal. The more ideas the better.

When the allotted time is up, cluster them into similar ideas and themes and give each idea a relevant title.

You now want to challenge the ideas.

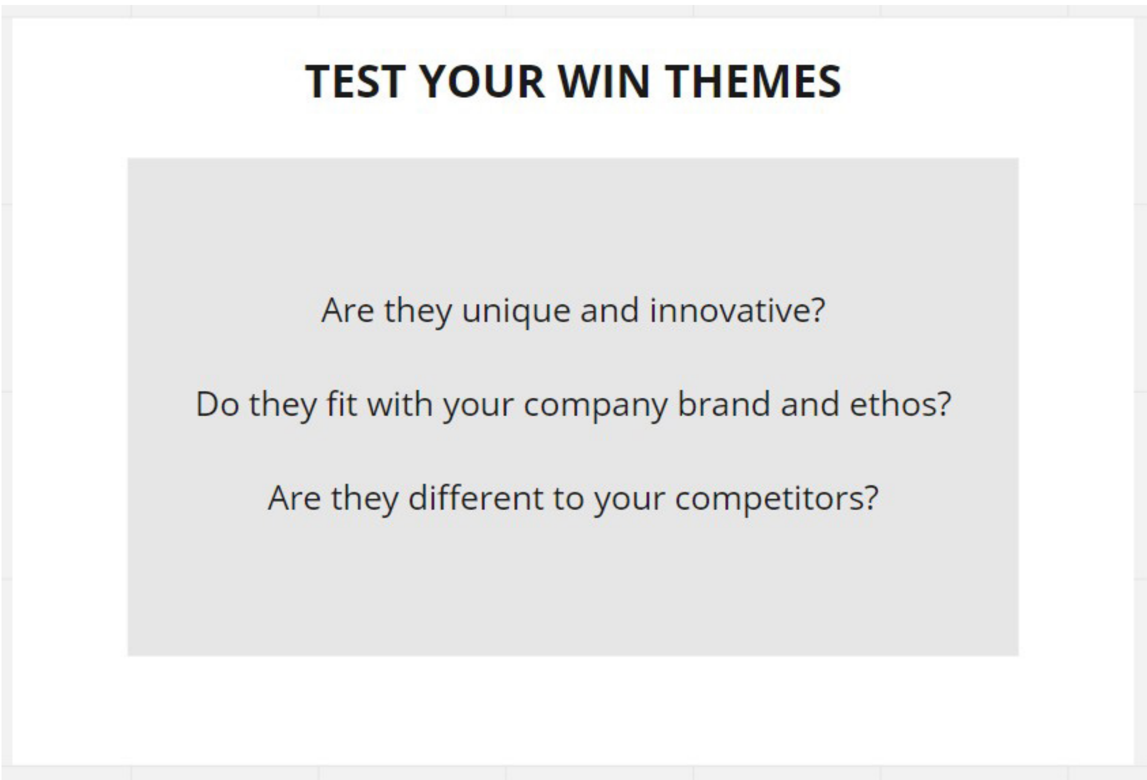

Figure 5.2 Key Win Theme Test Questions

What would the client be expecting from you and your competition? Does this play to your brand strengths and is it an opportunity to surprise and delight your customer?

What doesn't the client know? Are there critical points you can bring from your experience that could mean success or create a risk for the client? Being in the position of trusted advisor to a client, means being honest and highlighting any risks for them.

Is what you are considering innovative and compelling?

Most importantly, is each of the ideas unique to your organisation or could your competitors say exactly the same thing?

Continue to refine each idea. Discard the ones that are not distinct to you. Go back to your stakeholders in Section 2.4 and ask yourself whether these will resonate with the individual decision makers and key influencers.

I recommend no more than three or four win themes. You want them to be concise, distinct and to resonate. You should be able to use them in conversation with the client or integrate them into the narrative of a proposal.

If possible, test them with the client to see if they are hitting the mark.

5.1.2 WHAT COULD LOSE YOU THE DEAL?

Take another look at your win themes. Can your competitors offer the same or better?

Think about other ways you can refine or add value to what you are offering that are directly related to the client needs you have identified.

Spend ten minutes writing down different things that could lose you the deal. You already have a good idea of what is important to the client in terms of making a decision from Section 2.3.

If you have not thought of actions to counter these roadblocks or enhance your position, do it now. For example, if you need a team to implement your product, will they be available during the timeframe that is important to the client? If not, can you partner with another organisation or bring in contractors?

5.1.3 WORKING WITH PRICE

The most frequent reason I hear for potentially losing a deal is price. No one wants to end up in a race to the bottom when it comes to price. Here are some ideas around working with price. Obviously, they will be specific to your product or industry. If necessary, spend some time brainstoming ideas with your team on how you can build value around your product or service for the client.

Some examples I have seen resonate well with clients are:

- Investing the time from someone on your team to provide training or train the trainer to help with the client's internal capabilities.
- Co-investing with the client in building an asset or service that you can then use with other clients.
- Building a proof of concept for the client at your cost.
- Spreading costs over different periods of time to reflect the client's revenue cycles.
- Run a workshop with the client to see how a product can be tailored to the specific needs of their staff.
- Offer a trial period on a product or service.
- Provide value-adds like servicing or implementation.

Activities

1. Draft a focal question for a current challenge you know a client is having and test it with the client or a colleague.
2. Refer back to some deals you have won in the past. What was it that resonated with the client and won you the deal?

6 CREATING AN ENGAGING PITCH OR PRESENTATION

6.1 WHO IS YOUR AUDIENCE?

There are a lot of ways to use a human centred design approach in order to lift the standard of what you present to your client. We have already worked on knowing who your stakeholders are and we can build on it further to create a winning proposal or deliver a pitch or presentation that is going to not just resonate, but also be appropriate in tone and style. You may be presenting to a different group of stakeholders, so add to your stakeholder assessment if there is an additional evaluation team, such as a steering committee. You need to design your proposal or presentation so that it speaks directly to your audience's needs. What they read, see, hear and feel is crucial for building trust and moving them into the next stage of the buying cycle.

Knowing your audience for a presentation means adapting to meet their interests, their maturity of understanding, their attitudes and beliefs. I recommend doing some online research on platforms such as LinkedIn, in addition to any articles or thought-leadership pieces. Research and review any material they may have published to get a feel for their tone and style, so you can match it.

Look at your stakeholder assessment and mark those you expect to be supporters, challengers and/or detractors. For each of them consider their role in decision-making. What do they stand to gain or lose from this? What is their attitude towards your company? What are they going to want to hear, see and feel from you?

Consider any topics that may be of interest to particular individuals. For example, if you are presenting to the Chief Technology Officer, they may want more detail around any technology you are proposing, if Human Resources are attending, they may be concerned with the impact any changes will have on the staff and how that will be managed.

It is also important to consider what they may already know about your offering. If their knowledge of this product or service is on the more mature side, you may need to elevate the complexity of your presentation or visa-versa.

Finally, consider the tone of your presentation. Is this audience going to require something more formal or will creativity and presenting in a unique, inspiring way be more engaging? It is important to speak in their language. Do not use complex industry terms if it is not the right audience. Be cautious about making any sweeping assumptions about members of your audience.

6.1.1 CREATING A COMPELLING STORY

All the work you have done so far can be used to build an engaging and memorable narrative or story. Creating a draft storyboard will help you create a presentation that flows well and helps for rehearsing.

You may be provided an agenda or structure for your proposal or presentation, but here are the five elements you should try and include:

1. Setting the scene. Explaining why you are there and what might be going on in the world that is impacting you and the client (remember your Steeple assessment in 2.2?)
2. Build empathy with your audience. Explain why what you are bringing is important to your company and aligns with their aspirations or needs.
3. What are you bringing that differentiates you? It is time to bring in your win themes from Section 5.
4. What is your value proposition? What is the client going to get out of a deal with you? What added value do you bring?
5. Bring it back to the problem. Remember your focal question? What challenge are you going to solve for them, how, and what will the outcomes be?

6.1.2 CREATIVE SHOWCASING

How you choose to present will depend on your audience assessment. You will be giving the client an impression of what it is like to work with you. It is important to be authentic, but it is also an opportunity to leave them with something memorable.

If collaboration has emerged as an important theme in the work you have done so far, then do not talk at the audience. Some of the ideas below can help you create something more interactive, whether you are are presenting virtually or in person.

Live polling using websites like Menti.com can bring an element of fun and interactivity and work as a great ice-breaking tool. Using a whiteboard to illustrate your product or offer can be memorable and inspiring if you have someone with the skills to capture the conversation in the form of a visual.

If you are using a presentation, take advantage of features such as transitions, imagery and animation to break down the complexity of ideas or give the audience a visual break. Use emotive imagery to make your point if you can. The audience are far more likely to remember it. If you are using a whiteboard or similar tool, use annotation (also available with most virtual software) and capture any client comments or feedback, which will have the added benefit of showing them you are engaged and listening.

You could consider creating a video or building a microsite to show the client what their future business could look like, using the insights you have pulled together through this research.

6.1.3 VIRTUAL BEST PRACTICES

Many of us are continuing to work in a virtual or hybrid way and probably will for quite a while, as an impact of the Covid-19 pandemic. Although you may have mastered online presenting, below are a number of critical reminders and other tips to keep your presentation client-centric and engaging.

6.1.4 BEFORE YOUR VIRTUAL PRESENTATION

Conduct a check of your technology. Restart your computer, update your software, test any invite links and your video and audio. Ensure your laptop is on charge and use a headset to reduce any background noise. Turn off any devices that may compete with your bandwidth. Try and minimise any risks of disruption, including pets, children and possible deliveries. In the spirit of remaining human in our approach, it can sometimes be a good icebreaker to raise the possibility of interruptions at the start of your session.

Consider your physical setup. Elevate your computer if necessary, so the client is seeing your face and not the top of your head. If you are using two screens, make sure you are looking at the one with the camera so you do not appear to be distracted or looking off to the side. If you are in low lighting, consider positioning yourself with natural light behind your screen or a well-placed lamp.

If you are presenting as part of a group, consider making some standard backgrounds, with text outlining each presenter's name and their role. This makes it much easier for the client and will help build a more personal connection if people can use one another's names without trying to remember introductions. It also allows the client to pinpoint any specialists that you may have that can speak to their specific areas of interest or concern.

When presenting virtually, fewer slides and shorter presentations are more effective. If you do have something particularly detailed that you need to share, consider sending a hard copy to the audience in advance, creating a video or using it as an opportunity to follow up with the client after the session. Placemat-style handouts can work well for complex diagrams.

The most important thing is to know who is going to be in your audience. Understanding their individual agenda and interests will allow you to anticipate questions and topics that may be of interest to them and prepare a list of anticipated questions in advance. Once again, you should think about how the client feels about you, your team and your company. If there has been any negative prior history, you need to consider how you might need to answer questions, present a counter-argument or some form of explanation on how things have changed.

Plan what you are are going to talk about and who is going to do the speaking. If there are multiple people presenting, make sure one of you is seen as the lead by having them keep their camera on the whole session. By keeping everyone but the presenter off-camera, you create a sense of focus on the person who is speaking. Other team members can signal to the leader by putting their camera back on if they want to contribute an idea or are the best placed person to answer a question.

Most importantly, practice. Do a number of rehearsals to make sure the conversation flows easily from one presenter to another and that you adhere to any time constraints. Consider recording the rehearsal so that people can play it back and reflect on how they might be able to improve. Always allow time for questions.

6.1.5 DURING YOUR VIRTUAL PRESENTATION

How you use the technology available to you can make a big difference in how your presentation is received by the client. Obviously getting online early to check everything is working is a must, but give some thought to the other functionality that may be available, depending on the application you are using. None of these are hard rules, but guidelines based upon what I have seen work well in my experience.

Staying on mute while you are not talking to cut out background noise and distractions to the client is a must, but there are some other things they can be tailored, depending on your audience and the number of people you have presenting.

One of the big advantages of presenting virtually, is that there is no set limit to how many people you can have available. Of course you want to be guided by the number of attendees on the client side (and the diversity), but you have an opportunity to keep specialists on stand-by, off screen if you need them.

If there are only a few of you, then keeping your cameras on the whole time will make it more personable and allow the client to see your facial expressions, gestures and get to know you faster. However, if you are presenting as a team, you may want to consider the following.

Decide who is going to lead the discussion, probably the most senior person on the call. They should stay on camera the whole time, make introductions to other team members and help build their credentials. Giving someone a positive introduction will give the impression of a well-functioning team. After initial introductions, the rest of the group should consider going off camera, unless they are presenting. This will allow the audience to focus in on one or two people and feel like they are getting to know them. Team members should be called on to come on screen if they can provide additional insight, expertise or are best qualified to answer a client question.

Referencing something the client has told you previously or earlier in the session is a great way to show the client you have been paying attention to what they have been telling you. If you can link it directly to a solution that your product or service provides, even better.

Differing opinions, negative gestures or facial expressions can be amplified in a virtual environment, so it is important that you give people ample opportunity to speak, ask questions and use ways to show they are being heard.

Activities

1. Create an empathy map for a client you plan on presenting to. Note in the four labelled segments how you think the client feels, sees, hears and is saying.
2. In a different colour, note how you want them to feel, see, hear and what you would like them to say in the future.
3. Using a third colour, note any actions or changes you can make to get them to that desirable state.

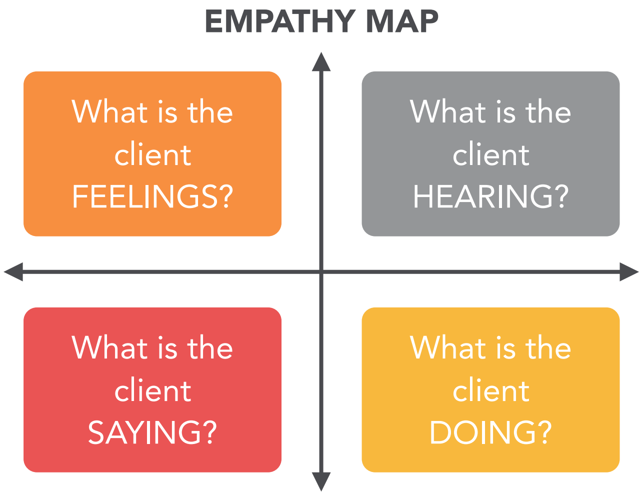

Figure 6.1 Empathy Map Template

7 PLAYBACK AND FEEDBACK

7.1 METHODS FOR GAINING VALUABLE INPUT

This is the final step in our process of using a human centred design approach to develop sales, but it does not stop here. Going through the process of asking your client for feedback on a proposal or pitch, or input on work you are doing for them is an invaluable step in showing them your collaborative approach, that you care about what the client is trying to achieve (their goals) and this step is often overlooked or delayed. No one likes to hear negative feedback, but this is your opportunity to refine what you are offering to make it something truly desirable to the client.

There are a number of ways you can do this, but below are a few suggestions.

Test your idea, practice your pitch for an audience. Brief them on what you know about what the client wants and the individuals you will be presenting to and what you are trying to achieve. Ask them to assess and give feedback to see if you are hitting the important touchpoints.

Is your pitch innovative enough if that is what the client values? Is it directly filling a need or solving a challenge you know they have? Are you showcasing your product in a creative way that is memorable but appropriate for the audience?

Organise a meeting after a sale, losing a bid or completing work for a client. Take someone with you, who understands your business, but can listen with an independent viewpoint.

Plan in advance what you would like to know from the client. Think about strengths and weaknesses, areas for improvement and try not to fall into the trap, as mentioned before, of thinking it is all about price.

Depending on the size of your organisation and your strategy, you may want to consider creating a standard template of questions for gaining feedback. This will allow you to identify any trends or common themes that can help you plan for future developments at your end.

A great way to get feedback from a client on what they really want is to create a prototype or a proof of concept. This could be something physical or a plan. Then test it with your client. What do they like about it? What don't they like about it? What would they like to change?

This gives you the opportunity to go away and iterate, then ideally, time permitting, test it again.

A note on prototyping. Prototyping should be rough and quick. You do not want yourself or the client to be working with something that seems too 'finished' or they will be hesitant to make changes. Many designers will use things like paper, Blue-tac, Play-doh and Lego to build a rough prototype, get feedback, adapt it, get more feedback and adapt it over and over again. James Dyson of Dyson (the global vacuum cleaner manufacturer) famously made over 5000 prototypes of the vacuum cleaner before coming up with the version that was so successful.

7.1.1 ADDITIONAL ACTIONS TO ELEVATE YOUR SALES OFFERING

In such a competitive global marketplace, how you distinguish yourself or your company from the competition is more important than ever. We have already explored in detail the importance of understanding what the individual decision makers on the client-side value, but what else can you do to be seen as unique?

Are there individual team members you have that bring experience or knowledge that no one else has? Consider ways that you can highlight this or give the client the opportunity to get to know them. It could be having a coffee or getting them to video of themselves with a short introduction that can be shared. Testimonials, referrals and quotes from other clients can obviously help build confidence in your product, service, organisation and team.

Consider any tools or existing assets that your client might see as valuable additions to the deal.

Think about any other 'gives' that the client would value such as workshops to co-design or sharing thought-leadership on a concept or idea. Perhaps there are valuable industry introductions you can make for the client. I emphasise here, that using our HCD approach they need to be desirable to the client for them to be valuable.

CONCLUSION

Throughout this book, you have been taken through a guided process, starting with an understanding of what Human Centred Design is and it's benefits for your business. You have developed a more empathetic understanding of their challenges and ambitions at the individual and the company level.

You have assessed your strengths and weaknesses and those of your competitors and looked outside at what others are doing to gain inspiration. You have iterated and developed your sales offering to bring something truly innovative to your clients

Finally, you have thought about how you can present to your clients in a more effective and engaging way, sharing a story of your business that is memorable.

This process is designed to be hands-on and reusable and can be referred to repeatedly when you need a refresher.

The more you practice this collaborative, client-centric way of working in order to know your clients better, the more naturally it will come to you. These sessions were designed to gradually build a change in mindset to encourage you to put your client's needs (what they desire) ahead of what you are trying to sell.

I hope you find this approach as useful as it has been for me and I look forward to hearing your feedback on how it has helped you win the hearts and minds of your clients and of course what has not worked so well for you, so that I can continue to evolve this book, using the same principles, with you as my client.

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