DEALSTORMING

The *SECRET WEAPON* That Can Solve Your Toughest Sales Challenges

TIM SANDERS

New York Times bestselling author of *LOVE IS THE KILLER APP*

DEALSTORMING

CHAPTER 6

Making Meetings Magic

I cut my teeth facilitating cross-company summits at Hughes Aircraft in the mid-80s. There, I led quality circle meetings, which were part of a greater effort to reduce manufacturing defects through collaboration. Engineers, assembly line managers, quality-control specialists, vendor relationship supervisors, and personal development directors all came together to talk about how we could boost output and stem the rising tide of rework.

As a graduate student, I was quite young for the task, and I struggled mightily to maintain control over the deliberations, which often descended into arguments and finger pointing. They seemed more like corporate group therapy sessions than problem-solving exercises.

Tail between my legs, I huddled with my manager, who instructed me to conduct a "deep dive" on how to lead meetings, especially those with participants who didn't necessarily work well together. I studied how other companies succeeded in the same situation and came across research on how 3M (formerly known as Minnesota Mining & Manufacturing) mastered their meetings through design. 3M's leaders believed that strong communications between associates stemmed from transparency and mutual respect. They also understood that when diverse groups of people convened, magic could happen. They developed a meeting management team that injected art and science to the process.

I implemented my own version of 3M culture at Hughes with "Make Meetings Magic," a theme that reframed our quality efforts as an exercise in sharing information in order to empower everyone to succeed. I included this theme on the invitations I sent out as well as the posters I designed by hand, which hung in the hallways and meeting rooms.

When we came together, I explained to participants how Hughes had the potential to leapfrog the competition in terms of quality if we could bring our minds together. I revealed research from companies like 3M, Motorola, and Toyota, demonstrating the relationship between meeting effectiveness and productivity-driving collaboration. I challenged meeting attendees to "play to win" and focus on uncovering information and insights buried in some silo.

At first, my motivational introduction was met with bemused smiles and folded arms. With each meeting, I layered more supporting data, peppered with recent industry or news reports connecting the meeting at hand with the threats to our business I was talking about.

Over time, our meetings became increasingly productive and more fun. Under the premise that "anything can happen when we know everything," we compared notes across department lines, laughed, argued, debated, and most of all learned a lot about how our plant really operated.

I carried this experience into my role at Yahoo!'s ValueLab, where we were tasked with leading dealstorming meetings around the company. By then, the 3M Meeting Management Team had published its findings in *Mastering Meetings* (McGraw-Hill, 1994), which gave me even more food for thought, along with myriad facilitation guides from every corner of the globe.

"Whenever we convene," I would say to my dealstorm attendees, "there are great expectations, great opportunities, and great costs. Let's not just pass the time hoping we'll get something out of the confined exercise. Let's make some magic happen during our time together."

Over the next few years, I learned exactly what it took to lead a diverse group of minds to come together around a big sales challenge. And win.

The primary purpose of the dealstorm meeting is to improve the problem owner's information quality and give her additional ammunition to advance to the next level. The meeting's stretch goal is to set the next best play. The aspirational goal is to generate buy-in, especially among those who will deliver on the deal once won.

In many situations, the information revealed in the meeting leads the problem owner to find his solution right away. Too often, common knowledge (*what we all know*) is driving current efforts, which aren't working. The meeting leader needs to create a safe place where information flows, especially that which is only known by a few. In *Wiser,* Cass Sunstein and Reid Hastie point out, "When people from different offices and departments feel free to say what they know, group decisions get a lot better and big mistakes are avoided."

The next best play is the action that will be taken after the meeting to move the deal to the next level. This is something I took from Duke basketball coach Mike Krzyzewski, who focused his teams on the next play—not the past, and not even the bigger picture. By "best," I mean that the group has found a potential solution that is head and shoulders above the rest of the options discussed.

In a dealstorm, when you bring to the table everyone who has a stake in the deal, postdeal execution goes more smoothly. These stakeholders will deliver the services or products or conduct arbitrage such as billing, revenue recognition, or case study marketing. When their voices are part of the conversation at the beginning and not after the deal is signed, you'd be surprised how much enthusiasm they bring to the back end of the process. Involving them in the conversation produces a greater likelihood that when it comes time to deliver on the deal, they'll be at the ready to assist.

In most situations, the problem owner (aka the account executive) is up for the task and should serve as the meeting's facilitator. It is my personal bias that she should be given a chance, as it's a great leadership development experience. Additionally, when the deal is signed and in delivery mode, she will possess more social power to lead everyone to execute.

However, I've seen several situations where the account executive is either too timid or the stakes are too high for her facilitation skill set. In some situations, the group's mix is a disaster waiting to happen. Keith Murnighan, professor at Northwestern's Kellogg School of Management, observes, "When some teams diversify, they create a dangerous fault line . . . which sets the team up for an earthquake."[1]

I've seen this happen when a dealstorm team includes engineers, salespeople, and finance leads. The differences of role and personality must be managed with care because they don't take care of themselves. And when a clash erupts due to poor meeting leadership, there can be collateral damage to relationships, which could block future collaboration.

The sponsor (often the sales manager) should decide whether someone besides the account executive should be brought in to serve as facilitator. You don't want cross-departmental meetings to be a waste of time or a pain to sit through—it will hurt your chances when you try to form future dealstorms.

The meeting facilitator must possess the following qualities:

Listening skills: He or she should be able to resist the urge to make statements during the process that inhibit participants from sharing information and ideas. After leading hundreds of collaborative meetings at the Palo Alto Research Center, John Seely Brown advises: "Active listening not only requires giving people the gift of your presence but also suspending your position and putting a tremendous amount of energy in understanding [the participant's] position."[2] This means that the facilitator should remain neutral to ideas and corporate ideologies, and let participants express themselves fully.

The facilitator needs to read the room as well. This involves looking for participants who, by their body language, demonstrate that they want to say something or are becoming agitated or disengaged. She should also note personality types as well, which could come in handy when creating small groups.

Protectiveness: When you gather up a diverse group of professionals, you must possess personal strength if you want to lead them to produce meeting value. A good facilitator protects the misfits, who are often shunned by others. Misfits often have nested information, which just may reveal the root cause of the problem or its solution. Too often, anything they say is colored by their personality and disregarded, even if they are right.

A strong facilitator also encourages the most junior participants to speak up. They may reveal account or product information that is not in sales force automation reports or campaign briefs.

The dealstorm meeting leader must also protect the "anxious

Andys," who worry about implementation issues or viability. In traditional brainstorming, we call them devil's advocates and consider them the enemy of creativity. But in dealstorming meetings, these folks are the guardians of the current process and, in many cases, prevent bad decisions from emerging.

Finally, the facilitator must protect ideas when they are first offered. Ed Catmull says that new ideas often arrive as an "ugly baby" and need time to develop into something beautiful through collaboration. Later, when the idea been fleshed out and it's decision time, the suggestion will have to stand on its own.

Assertiveness: A strong facilitator is willing to handle the meeting hogs who try to dominate the conversation. Extroverts, by their nature, want to fill dead air with the sound of their own voices. Studies show that in the average six-person meeting, two people will do 70% of all the talking unless a strong facilitator tames them.[3]

The facilitator also needs to manage the disruptors, who either bring personality issues to the table or distract others with their devices or side conversations. Strong meeting leaders are willing to stand next to distractors or between those who engage in side conversations, an effective tactic for guiding participants back to the topic at hand. When a participant repeatedly acts dysfunctional in the meeting, the facilitator should be ready to confront him or her after the break and resolve the issue.

Facilitators also need to be persistent in order to prevent anyone from free riding on the work of others. According to Kellogg School of Management professor Leigh Thompson, "free riding is the number one complaint of work teams."[4] These people get all the credit for being on the team but are stone silent during meetings, especially when it's time to commit to working on next steps. Facilitators can conduct round-robin idea submissions, which require everyone to contribute, and otherwise make sure everyone is participating equally in a respectful and effective manner.

Another way to increase participation levels is to place an audio recorder in plain sight so that the meeting can be memorialized for later reference. In an experiment conducted by Professor Thompson, two groups were observed using this technique. The group that was being recorded had much higher levels of participation than the one that wasn't. In my experience, recording meetings also has a side benefit: nothing falls between the cracks in the event that the information master can't keep up with the pace of conversation.

When the sales team is less experienced or the stakes for wide meetings are especially high, sales leaders should consider offering trained in-house facilitators to assist problem owners during dealstorms. At Yahoo!, our chief sales officer designated my group, the ValueLab, to serve as researchers and facilitators for dealstorm meetings. It was a shared service that was on call for qualified opportunities. We helped the account executives write their deal briefs and made facilitation a center of excellence in our group. Over time, we became pretty proficient at leading cross-departmental meetings that produced measurable progress on big opportunities.

You'll find dedicated facilitator candidates in your training department or your sales enablement group. Trainers are unbiased about specific deals and are usually well trained in dealing with group dynamics. Sales enablement leads are close to account and service information and are often skilled at distilling multiple voices and ideas into action items. It's important for these facilitators to remember that the problem owner (account executive) remains the dealstorm's leader and that they are there as neutral support staff.

Designing the Meeting Space

The facilitator is responsible for sourcing and arranging the meeting space. While exotic locations or innovative room designs are often used for creative meetings, convenience improves attendance. Getting everyone to the meeting is priority number one. For ease of implementation, I like to use conference rooms (not open spaces in a common area) that are centrally located.

First things first: the meeting room must have an information and idea-sharing space, visible to everyone in the room, where key points collected by the facilitator are recorded and displayed to the group by the information master. Flip charts or whiteboards are the best tools for this job. I've seen dealstorm meetings in which the information master compiled a list of nominated ideas on his or her laptop, projecting it on a screen. While that works, I like to go light on technology because it can distract from the meeting when there's a glitch.

There are three main lists that must be compiled during a dealstorm: ideas, issues, and action items. Facilitation expert Michael Wilkinson refers to these as parking boards.[5] This is where ideas or issues are headlined and then parked for the group's benefit. These boards help everyone know what's already been said, where it goes, and provides latecomers with a way to catch up on their own. Each board should have a title in capital letters across the top for easy identification.

If the facilitator plans on having participants do independent work at some point of the session, bring index cards or Post-it notes for them to jot ideas on and post on a wall or board.

Most conference rooms are not set up for collaborative meetings. The facilitator should arrive early enough to rearrange as necessary. The goal should be to eliminate barriers between people so they can engage and collaborate. According to Interactive Associates founder Dave Strauss, "The physical enrichment of a meeting room, especially the placement of chairs, has a powerful impact on a meeting. A semicircular seating arrangement opens up the space, and like a lens, focuses the energy of a group in a common direction, towards the [sharing space]."

Finally, it's important to make provisions for remote attendees. As a general rule, strive for 100% in-person attendance. Having people dial in dramatically reduces the quality of their participation and leads to a lot of awkward interruptions. I prefer that remote attendees dial in via video conferencing, Google Hangouts, or GoToMeeting, if needed. When a remote attendee wants to say something, he or she should raise a hand on screen or text the facilitator, who should be the only one checking his or her phone during the meeting.

Under no circumstance should a dealstorm commence if the problem owner and the sponsor are not physically present for the meeting, even if a strong facilitator is on hand. Their roles cannot be fulfilled remotely. After seeing a lot of meetings fall apart due to key attendees phoning in, I've come to the conclusion that it's better to reschedule the meeting than not have them in the room.

Key Responsibilities

As facilitator, you must ensure the meeting runs on time. The first dealstorm meeting should run between one and two hours, depending on the number of participants and complexity of the sales challenge. From the start time on the agenda to the promised adjournment, pay constant attention to the clock. If the meeting goes too long, it's an inconvenience to all participants and will hurt attendance at future meetings. Also, when meetings are running long, the end of the meeting gets rushed. That's usually where plans are made and action items are distributed, and you need time for that to go smoothly.

The facilitator is responsible for keeping everyone on point. If the discussion is centered on the problem space, deflect nonproblem points to the issues parking board or ask the participants to defer the point until later in the meeting, when you've turned to that topic. This is where assertiveness comes in handy. Altera's senior vice president of sales, Mark Nelson, who has sponsored many a dealstorm, has a saying about this: "Lead or be led."

Stay strong and keep everyone on task with the reminder that everyone is here to solve *this* sales challenge. Sometimes, participants will use the meeting as a platform to air non–deal-related grievances or bring up unrelated issues that have no place in the meeting. I've seen situations where long-standing arguments between silo dwellers erupted. Without strong facilitation, they descend into a meeting from hell for everyone involved. In this case, you must consistently remind participants about the purpose of the meeting, the value of everyone's time, and the importance of solving this challenge.

Finally, keep the meeting energetic and upbeat. Your meeting is only as high energy as you are. "When a facilitator leads a session with energy, the energy transfers to the topic," writes Michael Wilkinson in *The Secrets of Facilitation*, a book that greatly informed my consulting practice after Yahoo!.

Before I conducted dealstorm meetings for consulting clients, I always psyched myself up by playing high-energy music on my iPod. (This is a nod to Dwight Schrute from *The Office* sitcom, who always jammed on Metallica in the parking lot before big sales calls.) You see pro athletes do this during warm-ups, and as well as it works for them, it gets me going as well. I loved to blast tunes from Bob Marley, Fatboy Slim, and Queen before my dealstorm sessions. Nothing gets me more pumped to pummel the competition than hearing "We are the champions. No time for losers!"

One surefire way to keep the tone of your meeting light is to infuse it with humor. Dr. David Roach and his colleagues at Arkansas Tech University conducted research to measure the impact of humor on a brainstorming meeting's effectiveness. While it had moderate impact on vague goals (easy tasks), "humor radically improved performance with stretch goals."[6] After all, when it comes to tension—which dealstorms may engender—laughter is the best medicine.

At Yahoo!, I loved to play the seminal scene from *Glengarry Glen Ross* ("Coffee's for closers! . . . Third place, you're fired!") to get everyone yukking it up prior to diving into the solutions discussion. Several of our executives humorously manipulated profile pictures of meeting attendees to kick off their meetings off with a laugh. The key is to be creative but not mean spirited.

Now that we clearly understand the role of the problem owner and facilitator in the meeting, let's examine the key duties of the sponsor and information master. As you read the next section, put yourself in their shoes, even if you won't be serving in their capacity during the dealstorm. This section is useful to share with your sponsor and information master, who will fill those roles during your dealstorm.

As sponsor, you are responsible for supporting the facilitator by reinforcing the charter of the meeting. While the facilitator can handle disruptive meeting participants, high-ranking managers and executives are best handled by the sponsor, who will counsel them as a peer. As a leader, you should also remember to be one of the last to speak during interactive parts of the meeting. This ensures that no one is intimidated or deterred from sharing what he knows.

You also participate as a manager, commenting on implementation issues when it's time to consider finalists for the next best play and analyzing the facilitator's performance for feedback later. If the problem owner isn't facilitating the meeting, make sure he is driving the group's ability to reach consensus and commit to action items. After all, this is his account, and he needs to maintain a leadership role in the process.

As information master, you are responsible for capturing the essential thoughts from the meeting. Avoid editing any participant's submissions; instead, write exactly what was said. The writing must be very legible, and parking boards must have the title across the top of the flip chart or whiteboard.

In many of my dealstorm meetings, an artistically inclined information master brought ideas to life by drawing diagrams or illustrations to represent complex ideas or processes. It's a great way to reduce abstractions and produce more clarity for the entire group. Even simple timelines or process flow charts can bring ideas to life.

At the end of the meeting, collect all flip charts and take photos of the whiteboards so no information is lost. If the meeting is recorded, the information master should consider sending it off to an online transcription service. (For options, visit TimSanders.com/DealStorming.) All of the information should be immediately given to the problem owner.

Facilitating the Meeting

In facilitating a dealstorm meeting, you need to stick with the agenda, ask questions as opposed to making declarative statements, and keep your eyes and ears open at all times. If you stay with the process, and convince others to follow it, you'll almost always reach the primary goal of improving insights and options.

There are three basic types of dealstorming meetings: convenes, regroups, and reconvenes. The convene meeting is a kickoff meeting and will be the focus of this chapter. The recommended length is one to two hours, depending on the size of the group or opportunity and the complexity of the problem being tackled.

While agendas may vary with the situation, here's a standard layout:

1. Gathering time
2. Opening remarks
3. Introductions
4. Ground rules

5. Problem discussion
6. Solution discussion (open, narrow, close)
7. Action items
8. Review parking boards
9. Close

Don't bother sending out an agenda prior to the meeting; you want everyone to spend his or her time reading the deal brief and working on assignments. But you should post the agenda on a flip chart or a whiteboard in the meeting and, if possible, list start times for each section. I prefer this to handing out a printed agenda, which is usually doodled on or discarded later.

Gathering Time

Here's a technique for making the meeting magic from the start, from Michael Wilkinson, author of *The Secrets of Facilitation:* invite everyone to gather in the conference room or just outside of it ten minutes prior to the meeting start time.[7] Make sure this appears on the meeting confirmation email you send, along with the deal brief (e.g., "We'll gather outside Conference Room A12 at 9:50, and the meeting will convene at 10:00").

Prior to learning about this clever agenda hack, the majority of my dealstorm meetings ended up starting ten or so minutes late. Such is the nature of many company cultures. By including a gathering time, you send a strong signal to participants that the start time is firm and that they should be on time! If key participants don't show at gathering time, the problem owner has a chance to call or text them to make sure they are on the way.

The gathering time also allows casual, "how ya doin?" banter, which can create comfort level between participants. If possible, have a snack and/or drinks available then so they can load up prior to the start time.

A few minutes prior to the start time, the facilitator should declare the two-minute warning or, as I like to do these days, shake the cowbell app on my smartphone. Don't let gathering time bleed over into your allotted meeting time.

Opening

Magic meetings have strong starts. To open the meeting, the problem owner should state the goal of the dealstorm project, as per the deal brief, and remind everyone why winning the deal is important. Be sure to explain the significance of the opportunity in the widest possible sense and, if appropriate, position it as a challenge for "all of us to find the truth, and rise to the occasion. Just like we always do."

Collaboration research suggests that nothing motivates people to reveal what they know and fully participate in discussions like a challenge to learn and solve as a matter of pride and personal excellence.[8] Competitive juices run a close second, so if that's your lever, use it! Remind the team who will win the deal if your company doesn't, how you feel about it, and what that means to everyone in the long run.

Next, explain that the primary purpose of this meeting is to gain information, insights, and potential ideas. Let them know that time is of the essence in any sales opportunity and that, in some cases, if the winning play won't emerge in the allotted time, you'll have to make the call on the next play, just like a team's head coach. This is important because this way no member of your dealstorm team will mistakenly think that the solutions are determined by committee and that any next step is up for a vote. In my experience, most nonsales dealstorm participants are happy to contribute to the project and not have to own the decision.

Finally, thank the participants for their valuable time spent on the project and, in particular, attending this meeting. Let them know that you and your sponsor have thought a lot about who was invited and that they were selected because they contribute equity to the group or that they deserve a place in the beginning of the process.

Introductions

The problem owner should also make the introductions, as she is the recruiter of the team and has the best visibility into each participant's potential contributions. These introductions set a context for the discussions that will happen later. When people hear comments from people they don't know, it's hard to accept them as legitimate unless they are aware of their relevant experience. Don't take more than a minute or so per attendee, as it's easy to get bogged down here and chew into problem- or solution-finding time. Start with why she is on the team and then explain what resource she has to offer.

At this point, it's a good idea to conduct an icebreaker exercise. At Yahoo!, I loved to ask meeting participants to tell us what their number one gift was that they used at work to solve problems. Sometimes, this led to helpful confessions, such as, "I'm not afraid to admit I don't know what I don't know," or "I can draw any thought on a whiteboard," or "I'm great at using search engines to prove or disprove anything I hear in a meeting," or my favorite, "I've got a great bullcrap detector!"

Another good icebreaker comes from my friend Ken Rutkowski, who conducts high-energy meetings with Los Angeles–area entrepreneurs and entertainment industry professionals. He calls it "speed to cool," in which attendees have thirty seconds to tell us something about themselves that makes them different than everyone else. These icebreakers force the participants to usher their first words to the group, hot on the heels of a generous introduction.

Ground Rules

At this point, the facilitator takes over the meeting (in the event the facilitator is not the problem owner). She will reveal the ground rules for the meeting, which should also be displayed on a flip chart.

A meeting without rules can easily descend into anarchy. While some might worry that rules inhibit creative thinking, the reality is that they actually help. According to facilitation expert Michael Wilkinson, the presence of effective ground rules not only improves the quality of ideas that come out of a meeting, they make the experience much less painful for everyone involved.

Over the last fifteen years, I've utilized various ground rules, looking for the ones that apply best to a deal-solving situation, where participants come from all departments and represent all levels of seniority. The following four work best for most situations:

1. *Ideas can come from anywhere.* This declaration is a part of the sales culture at many of the highest performing companies I've worked with. This rule means that no idea should be rejected due to its source. There are no experts who wholly own their domain. In fact, people far removed from it can have the most helpful perspective.

2. *Act on facts; research hunches.* It's very easy for the discussion to move toward gut instincts, rules of thumb, and anecdotal experiences. Without this rule, the debate often ends up with "trust me" as the trump card, often followed by discussions of one's expertise or whether his last hunch really played out. When someone believes that an assumption behind an idea

is logical, that doesn't mean it should necessarily drive a next best play. In some situations, I've created a research parking board where hunches are slated for background checks to verify their accuracy. In the case of out-of-the-box ideas, this rule recognizes that presumption lies with the status quo.

3. *Stay focused on the section at hand.* When you bring together creative/smart/energetic people, ideas come to them fast. Sometimes, it's easy for someone to jump straight to the solution or jump backward to the problem area toward the end of the discussion. The facilitator should emphasize that he will use the parking boards for any comments or ideas that don't belong in the current section of the meeting. This means that each section should be clearly announced by the facilitator, to open the floor to ideas that participants have been holding back out of respect for this rule.
4. *No distractions.* The facilitator should make it clear that the meeting won't welcome any interruptions, including ringing mobile phones, side conversations, laptop or tablet use by other than the information master, or other such gadgety annoyances. If there are remote attendees, ask them to mute their lines unless they are going to make a comment or ask a question. It's important that this rule be laid out, giving participants the benefit of any doubt, as I don't like the ground rules part of the agenda to come across like the facilitator is the principal and the participants are unruly students.

Problem Discussion

At this point, the facilitator should refer to the problem question stated on the deal brief and invite a discussion about its accuracy in describing why the sales challenge exists. The meeting should allow for a minimum of fifteen minutes of discussion to make sure the real sticking point and its root cause are clear. In many cases, problem owners are too close to the situation to see what's really going on, and that's where the group dynamic can add a lot of value.

A few years ago, I saw firsthand how important a thorough vetting of "the problem" could be. A digital media sales team was pursuing a big advertising program with one of the Big Three Detroit-based automakers. They were stuck in the convince level, specifically on price, so the account executive assembled a diverse dealstorm team to help him break through.

During the previous meeting, the prospect responded to their pitch by telling them, "You'll need to beat our current ad partner's price to win our business!" The account executive stressed that their program was a rich media solution as opposed to the display advertising solution the current partner provided. Rich media inventory was not as vast as flat display, he explained, so it was impossible to match or beat the competition's price.

He and his manager deduced that the ad buyer's firmness on price and his objection to their pitch was likely due to a limited budget. In the deal brief, his problem question was "How might we convince [the car company] to find an additional $200,000 in their budget?"

When the problem discussion started, a marketing manager invited to meeting challenged the problem owner's assumption. In her previous career, she worked at an ad agency that handled campaigns for car companies. "It's not a budget issue; it's a value issue," she explained. "Our proposal is a small part of their billion-dollar ad spend, so the extra 200k is a rounding error." This set off a vigorous debate about why "match their price" was the objection.

In the end, the account coordinator offered up a vital piece of insight: "They don't believe there's any performance difference between our rich media and their current provider's display ads." The account exec reminded her that they had showed two slides documenting their internal reporting of superior results with rich media . . . by 25%!

At this point, the marketing manager identified the true root problem: credibility. "No major advertiser will change providers because of your internal reporting! There's no way they can verify it." She explained that seasoned ad buyers have many tales of being burned by case studies and that usually you had to get into the account and prove yourself over time.

Once they could all agree that credibly differentiating their product was the real problem, they moved to the solution discussion, which quickly centered on working with a third party like Neilsen to verify their claims. Within three months, they repitched their program using third-party research to respond to the credibility concern. The ad buyer signed on at their price.

Problem finding is the foundation for developing winning solutions to sales challenges. As John Dewey once wrote, "A problem well stated is half solved."

Begin this section of the meeting by revealing the levels of the sale from Chapter 2 and then identifying exactly where the sale or renewal is stuck. (You can download a PowerPoint-friendly image at TimSanders.com/DealStorming.) It's helpful to educate the group, especially the nonsales participants, about the sales process so they understand that it's a complex game requiring multiple solutions along the way.

Usually, the sticking point is evident: if you can't make contact with the right influencer or decision maker, that's what should be addressed. If you can't conceive the right deal elements (products, services, offer), that's also pretty straightforward. However, the cause of the sticking point, the true problem, is another matter entirely. So far, you have identified a symptom and not its cause. And innovators, like the members of your dealstorming team, don't try to solve the symptom—they seek to cure its cause.

The facilitator should read the problem question from the deal brief and then invite a discussion about the cause behind it. The deal brief includes information on the attempts made to solve the problem by the problem owner, so a quick review sets the table for a closer look for the root cause of the sticking point.

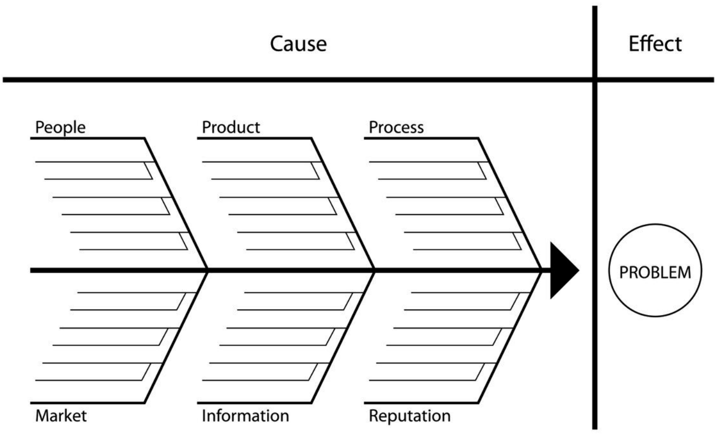
One of the best questions the facilitator can ask at this point is, "Is there anything missing here?" This allows any participant to offer up information or even theories that can confirm or redirect the discussion. For existing account relationships, the facilitator should look to participants closest to the customer for feedback. If someone chirps in with something, the information master should record this feedback on the flip chart, creating a "Problem Ideas" sheet to track the discussion.

While this approach can sometimes bring the root cause(s) to the surface, the facilitator usually needs to employ a template (a repeatable exercise) to tease them out. As I mentioned in the last chapter, repeatedly asking "And why is that?" when faced with a sticking point can lead to discovering the problem behind the symptom.

In many sales challenges, there are several root causes behind the sticking point. In this case, it's important to identify them all and then prioritize which ones need to be solved to move forward. Another quality improvement template, the fishbone diagram exercise, works wonderfully in this case.

In the late 1960s, Kawasaki's Kaoru Ishikawa developed an exercise in which his managers identified and prioritized root causes of defects by creating a diagram that started with the surface problem, or sticking point, and worked backward to figure out possible causes, including several categories (think: buckets) and subcategories of cause. They grouped defect causes into people, process, machine, materials, measurement, and information categories, exploring where each one was breaking down. (These were the most appropriate categories for finding manufacturing quality problems.) Then they ranked their contribution to lower quality. In most situations, they isolated one or two specific causes that produced most of the problems.

Now let's apply this technique to a sales challenge. For a technology solutions provider, this might be a good fishbone:



In most of my dealstorms, every cause connected to a sticking point or account crisis fits into one of these six categories.[9] Each one can apply to the buyer or the seller. As I mentioned previously, many of the problems that need to be solved in a stuck sale are internal. The people category refers to the individuals involved in buying as well as the individuals involved in selling to the prospect or working with the client. The product category includes all elements of the proposed deal, including services, billing, and reporting. Process concerns either how the buyer does business or how the seller pursues deals and contracts them. Market refers to economic conditions, competition (either the buyer's or the seller's) and proposed, recent or likely mergers or acquisitions that can affect the selling process. Information includes what the buyer knows, needs to know, or has supplied the seller. It also includes internal information the sellers have that influences their tactics, proposed deal, or deal structure. Reputation involves the seller's track record in terms of product or service quality as well as corporate social responsibility. It can also include the buyer's track record in terms of how they pay their bills or treat vendors, which comes into play in the contract phase.

In some situations, you may find that there are other categories that influence your deals getting stuck or accounts going south. (Download the above or a blank category fishbone at TimSanders.com/Dealstorming.)

In many dealstorms, the fishbone diagram exercise sparks discussions that reveal root causes behind the dominant difficulty. That's why the diagram includes a drop-down line underneath each category cause. Also, you'll often find that there are multiple causes behind your problem. This can mean that there might be more than one problem that will need to be solved to get past a single sticking point—and that's OK. If you don't attempt this exercise, you could eliminate one cause but still not have a solution that takes you to the next level of the sale.

Another problem-finding exercise is to discuss personality attributes of people in the influence map section of the deal brief. Whether it's the current contact, key influencers, or decision makers, their attitudes, beliefs, and backgrounds can all be root causes of the sticking point. If one of your resources has a similar job or history to a problem prospect, his or her insights may be quite revealing. If you've assigned someone a research dig into one of these people, have her briefly summarize relevant findings.

Finally, the root cause can sometimes be found by locating an analogous situation in which the same symptom appeared as a sticking point. It could be a previous sales situation, either within the same industry or involving similar personalities. In this case, a tenured sponsor, fellow account exec, or coordinator might have revealing insights that transfer to the current situation.

It's important for the facilitator to drive consensus on the root cause of the problem before moving to the solution discussion. And please make note if you're rushing through this problem discussion for the sake of getting through your agenda items. If the discussion takes more than fifteen minutes, it's more of a reflection of the problem's complexity than a misguided agenda. Take your time. As David Strauss points out in *Making Collaboration Work*, "If you can't agree on the problem, you won't agree on the solution."

The Solution Discussion

This is the heart of the dealstorm meeting, where next best plays are nominated, debated, and agreed on. At this point, the facilitator announces that the problem-solving portion of the meeting is starting and does a quick check to identify how much time is left. Explain that the goal is to find the next best play as well as a backup option if after-meeting verification doesn't support the first play as a viable move. Looking for more than one idea overcomes the group dynamic known as the primacy effect, "the strong tendency to be attracted to the first option that is suggested," which can often lead to an incomplete exploration for the right solution.[10]

In this stage of the meeting, the facilitator should explain the solution discussion process, which consists of three distinct parts: opening, narrowing and closing. The first part of the discussion is the opening, in which ideas are nominated with some explanation but no debate. Next comes narrowing, in which ideas are vetted for solvency, doability, and costs. Finally comes closing, in which options are rated or ranked and then a decision is made on the winner and the backup.

During the solution discussion, enforce this process firmly, reminding everyone of process as necessary. Anything not related to a solution should be parked on the issues parking board. The information master should headline options on the idea parking board, leaving room underneath each entry for more notes or votes later.

A good first step is to ask the group, "Is there anything inside the box we can do? Is there a best practice that we can apply here?" I learned this trick at Yahoo!, where vigorous root cause discussions often revealed that we had a solution in hand we'd never tried because we were trying to solve the wrong problem. When insider ideas are nominated, the facilitator should ask the problem owner, "Have we tried that in full? What happened? Anything changed since then?" This isn't an invitation to debate the idea but, instead, confirm that the existing approach isn't going to take the team to the next level.

Next comes the out-of-the-box discussion in which the group nominates novel approaches.

Prior to calling for ideas, review the constraints section in the deal brief. Identifying constraints up front helps resources avoid suggesting any ideas that are not an option. Such constraints may include budget, time, resources, discounting or bonus limits, or boundaries. It's important for the facilitator to get agreement from the group that these are real constraints and not just the costs of innovation. Next, review the resources section so everyone in the room is aware of what they can leverage in solving the problem.

At this point, ask for or collect submissions and list them on the ideas board. In the event there are dominant extroverts in the room or potentially helpful introverts attending, consider an alternative to going around the room for verbal suggestions. Options include brain writing—writing ideas on index cards or Post-it notes—or cyberstorming—submitting ideas electronically on a sharable document or cloud-based service for the information master to organize and list. (Visit TimSanders.com/DealStorming for a list of resources.)

In the prepare stage, if applicable, problem owners encourage some or all of the resources to bring ideas to the meeting based on their review of the deal brief. As mentioned in the last chapter, the problem owner should also have a few suggestions in his back pocket to offer up in case the call for ideas fails to produce any from the group. Getting the first idea on the table is the key to inspiring other team members to make creative connections or share ideas they were too timid to offer up for discussion.

In the event the problem owner, acting as facilitator, nominates an idea, according to Leadership Strategies' Michael Wilkinson, she should "float" the idea, asking the group, "What would be the benefits to doing this?" It's important that the team knows you didn't come into the meeting set on any one idea. It's also important that facilitators stay as neutral as possible on ideas.

There are templates and exercises you can use to bring out ideas in the event the listing process didn't reveal several good options. The first one is the analog exercise, used at companies such as RCA, Singer, and Kimberly. This exercise is known in innovation circles as synectics, loosely meaning "to work together from the outside."[11] In this exercise, the facilitator asks the team to name a similar situation to this root cause or problem situation. Let's take the example of an account stuck in the conceive phase as a result of the account executive not having enough information about the customer's operations (the root cause). In this scenario, the group should find an analog—another situation where getting to the info in the vault was required. In one of my dealstorms, a resource suggested that a physician trying to diagnose a patient without having direct access to the patient or his medical records was analogous to a root cause that had been identified. In another meeting, a resource brought up police trying to solve a crime where uncooperative witnesses were involved. In both situations, the facilitator then asked, "Well, how should they proceed?" As the group deliberated, ideas surfaced about the fictional situations that were mutually relevant to the sales challenge at hand.

Imagineering is another template I use with success. In *Applied Imagination,* Alex Osborne introduced the concept as "letting your imagination soar, then engineering it down to earth."[12] This involves looking at an imaginary situation, then analyzing how the problem would be solved in that context. For example, the group could imagine that the sales challenge was solved, then work backward to figure out what made the difference. If you are trying to get past the convince level, you could start with the prospect asking for the contract, then analyzing what it took to get him or her over the hump. This mental exercise can reveal obvious solutions that, until that moment, had never been spotted.

Another Imagineering approach involves thinking about imaginary scenarios, such as what would our best competitor do in this situation to solve the problem? This is when the group's diversity might really add value. I've witnessed situations in which really strong ideas emerged when a resource was freed from the false constraints of his own company, taking on the mindset, agility, or courage of a top competitor.

Scenario planning is an exercise in which two or more futures are imagined and then solutions are sought that work in either situation. Pierre Wack pioneered this exercise as "a way of liberating people's insights" while leading innovation teams at Royal Dutch Shell.[13] At Toyota, for example, while exploring what to do if the price of oil skyrocketed (one scenario) or if the world's consumers became very ecologically oriented (a second scenario), the core idea of the hybrid Prius was conceived.

At Yahoo!, I adapted the scenario-planning template when problem solving a strategic marketing partnership with Hewlett-Packard. I'd assembled a large dealstorm team, including several high-ranking HP participants. After two days of presenting our services to HP, we were at an impasse. We couldn't convince them we had marketing solutions that could provide value.

I offered to fetch lunch for the group while they ran through an exercise. I asked them to pretend that Carly Fiorina (HP's CEO at the time) had just announced that they were buying Yahoo! for thirty billion dollars and that this group's assignment was to make the merger accretive. "If you bought Yahoo!," I asked my HP dealstormers, "what would you do with our resources and capabilities to recoup the cash?" When I returned forty-five minutes later, the HP team had come up with over a dozen ideas, which turned out to be the basis of a multimillion-dollar deal.

Another template that can drive ideation is known as the SIT method, which stands for Systemic Inventive Thinking. Its premise is that most problems are solved through the exercise of subtraction, addition, multiplication, or division.

For subtraction, "the trick is to eliminate something previously thought of as necessary."[14] In one dealstorm where I was advising a defense contractor as they prepared their final pitch to a government IT buyer, we subtracted the PowerPoint presentation from the pitch process and instead invested forty-five minutes in a question-and-answer session, leaving behind a printed copy of the slides that the prospect could then peruse. Several sales leads in the room freaked out, exclaiming, "We've never pitched without one!" But in fact, the approach dramatically increased the engagement of the prospect, getting them to reveal key buying triggers and moving the conversation to contract.

Addition is the act of adding components to the approach. I've been in situations where my team was stuck trying to make the right contact, so adding more targets ended up solving the problem. In the case of the Allegis contract problem, Alyssa added a new provision for a technical lead, which solved the prepayment impasse.

Multiplication involves creating several copies or instances of an element of your deal (e.g., prospecting tactic, research task, product, service, presentation item, contractual term). This approach has worked with teams trying to conceive the deal, where several rounds of due diligence were conducted, revealing key information for applying the right mix of products. In one situation where I was working with a software company that was stuck trying to convince the prospect to invest three million dollars into an annual license, we increased the term to five years, which allowed us to create better price points and add a lot more services, given the length of commitment.

Division is the act of breaking down a component into its parts. When working through the contact phase, I've seen teams divide and conquer by approaching technology, finance, and business operations separately. Once, when I was consulting with a payroll services company that was trying to save a multimillion-dollar omnibus deal, we reduced our downside by breaking it up into over a dozen deals, based on the customer's geographical regions. In the end, billings actually increased.

After identifying the right exercise for the situation, one option is to break the team into small groups and have them choose a group leader and a scribe to record their collective ideas. Groups should be given a relatively short period of time to discuss their ideas and then have the leader present their findings to the whole dealstorm team.

In the case of Imagineering or Systemic Inventive Thinking, if the team is large enough, the facilitator can use small groups as a way of generating well-thought-out ideas quickly and giving everyone a chance to participate. For example, different groups could ideate based on different scenarios. In the case of SIT, four groups could use subtract, add, multiply, or divide as the parameters for their ideations.

It's very important that you, as facilitator, ensure that the opening part of the solution discussion be completed with at least twenty minutes left in the meeting. Announce time checks, and in the event of small group breakouts, plan accordingly.

When the ideas are collected, announce that the narrowing portion of the discussion has begun. Refer to the ideas board, and review each headline, asking the resource who offered it up, "Why does this work?" and "What's your key assumption behind it?" Then open the floor to the group for any questions or objections to the idea's solvency, doability, or costs.

Be vigilant in ensuring that naysayers are "hard on ideas, but soft on people," as Wilkinson recommends, and that generalities such as "It'll never work" or "That's a dumb idea" are converted into very specific points.[15]

In many cases, when ideas show promise but also contain flaws, you should encourage participants to build on ideas. In Pixar culture, this is called plussing. This tactic requires someone with an objection to an idea to suggest how to make it better. For example, one of my technology solutions clients created a dealstorm to pursue a Fortune 100 prospect. They were stuck in the conceive level because they couldn't get the prospect to reveal enough information about their technology stack (hardware, software, third-party vendors) to craft recommendations and calculate the value proposition in terms of savings. One of the team members from research suggested that they hold a "share and learn" seminar at headquarters, where high-ranking executives from both companies would sit on a panel to discuss future trends in technology and how they are leveraging them. In his mind, this could lead to valuable insights to help conceive the deal.

A marketing manager in the meeting worried that this wouldn't be enough to entice the prospect's executives or technology managers to take the time to attend. Following the plussing rule, he said, "Yes, and we should hire a well-known business author to be the moderator for the panel!" The team responded positively to this suggestion, realizing it could add sizzle to the event.

A finance director in the meeting feared that this could dramatically add to the cost of the sale without any guarantee that it would excite the prospects enough to attend and be forthcoming about how they ran their business. To protect the company's investment, he suggested that they first survey prospect contacts to find out what books they were reading, sharing, and talking about. By investing in a moderator that they knew the prospect respected, the panel discussion would be well attended and lead to high levels of engagement. This turned out to be the winning play. The sales leader then organized a breakthrough event where the prospect revealed the nitty-gritty on what they used, who they worked with, and what they were researching for future application.

To quickly identify finalists for the next portion of the discussion, ask the group to help classify the idea as hot, potential, or problematic by show of hands. The information master should create a new flip chart, labeled "Finals," to contain the short list of potential solutions.

During the closing portion of the meeting (a span of ten minutes), invite the group to rate the top ideas. The facilitator can pass out adhesive dots and direct participants to place them on the sheets listing their favorite solution. Or you can ask each participant to go up to the finals flip chart and give each idea a score from 1 to 10, with 10 being the best score. If the meeting's time is running out or the nominated ideas need follow-up research to vet for effectiveness, the problem owner and sponsor can confer after the event and pick an idea from the finals flip chart themselves. In the event you plan to go that route, make sure you establish early on that you two will ultimately choose the next best play from the short list that the group creates.

If possible, it's desirable to generate buy-in from the participants on the next best play. But consensus isn't always possible—and in the case consensus isn't reached, the problem owner and sponsor will serve as fallback deciders.

Consensus isn't about everyone loving the idea but instead making sure that everyone can live with it later. This might involve some negotiations, in which the facilitator asks detractors of the next best play idea, "What it would take to live with this idea?" This forces them to build upon ideas rather than rejecting them outright.

The value of driving consensus is that it generates team kinship, satisfaction in the meeting's outcome, and a sense that everyone's input is valued. In the case of those who will be required to deliver on the deal after it's signed, it's key that they be on board with next steps, especially in solving the conceive level, where service levels will be set and promises will be made to the prospect.

It's important to point out that the first dealstorming meeting doesn't always end with the identification or adoption of a winning idea. Perhaps we were lacking information that we didn't know we needed, or we couldn't verify key assumptions or answer implementation issues with the group at hand. While the goal of the meeting is to hatch a plan of action, this won't always happen. But each and every time, if the prep work and facilitation are strong enough, the meeting does produce valuable insights. In that event, the problem owner should thank the group for their contributions, outline action items, and, if necessary, schedule another dealstorm session.

In the final minutes of the meeting, the facilitator conducts the actions items portion of the agenda. Whether the action items are research or acting on the decisions made during the meeting, the problem owner ultimately is responsible for the after-meeting work. However, he may canvass the room, asking for volunteers to assist with these tasks. In many cases, certain resources are in a good position to act on ideas or conduct necessary research to verify the next best play or the backup play.

The information master should create a new flip chart labeled "Action Items," outlining actions and who is responsible for them. Under no circumstance should someone outside of the meeting be assigned any work. This is a prescription for nonexecution—and a little resentment, too.

The facilitator should then review the issues parking board, where nonagenda items were recorded in the course of the meeting. Ask the room if there's any required follow-up on that board, and if so, who owns the work. Normally, this isn't the responsibility of the problem owner, who should be laser focused on moving the deal or account save to the next level.

Finally, the problem owner should conclude the meeting by thanking the group for their time and participation. He or she should remind everyone of the importance of solving the challenge. As I mentioned, in many cases, the dealstorm meeting creates more questions than answers—but that's a good thing. Here again, we call on the power of incubation as the problem owner asks everyone to consider the problem, its cause, and the potential solutions to it over the coming days and weeks. I've often concluded my dealstorms by telling the participants, "As you drive to work, eat lunch in the cafeteria, or watch TV, think about this challenge. Consider the problem space and the ideas we've thrown around today. If you come up with anything, please send an email to me." You'd be surprised how much great information and new ideas came later from the resources who couldn't stop thinking about the problem and eventually cracked the code for the problem owner. Even though the meeting itself is important, if conducted correctly it's just the starting point for truly innovative thinking by the whole team.