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Situation Slides: A Swiss Army Knife for Sales and Presales

A Never Stop Learning! Article

"It's a floor wax *and* a dessert topping…!"
– Saturday Night Live, January 10, 1976

"Let's see," I wondered, "What are the various tools on my travel Swiss Army Knife?"

- Large blade (*extremely* sharp)
- Small blade (*also* extremely sharp)
- Combo can opener and flat screwdriver (I've used both)
- Combo bottle opener and larger flat screwdriver (the bottle opener has seen a *lot* of action…!)
- Corkscrew (never leave home without one!)

That's *seven* individual tools cleverly presented in a package about 8 x 2.5 x 1 cm (3¼ x 1 x ½ in). Great Demo! Situation Slides are the sales and presales equivalent, *also* providing seven valuable tools for your use!

What's in This Article for You?

Situation Slides are a Swiss Army Knife of tools across the entire sales (and buying) process, for leads, discovery, demos, and more. We'll explore *seven* fabulous applications of Situation Slides (plus a bonus):

1. A measurement for Demo Qualified Lead
2. A measurement of discovery completeness
3. Summarizing discovery
4. Hero stories
5. Vision Generation Demos
6. A measurement for product "fit"
7. A test for No Decision outcomes

Bonus! A tool for selling internally

Tool Number 1: Demo Qualified Lead

“If you aim at nothing, you will hit it every time"
– Attributed to Zig Ziglar

What’s your definition of the following?

- A Lead
- A Sales Qualified Lead
- A Demo Qualified Lead

For many organizations, the answers are:

- A Lead? Has a heartbeat.
- A Sales Qualified Lead? A potential customer who has shown a clear intent to purchase a product or service and has met specific criteria (such as BANT).
- A Demo Qualified Lead? Wait, what?

Surveys report that ~30% of all demos are “wasted,” due to a lack of qualification. That’s nearly one *third* of all demos delivered!

Why is this the case? There’s a huge gap between a “Sales Qualified Lead” and having enough information to deliver a credible, focused demo. Let’s use an analogy to explore this…

Imagine that you’re hungry and you want to eat at a restaurant. You open Google Maps and search for restaurants nearby.

A “Lead” is any restaurant in the area. Is that sufficient information for you to make a decision? Likely not!

A “Sales Qualified Lead” includes the opening hours and a brief exploration of the menu. Is the restaurant open today and during the time window you want? Does the menu look acceptable or interesting?

For some folks, this might be enough information to take a chance and try it out. But most of us have one more criterion: Reviews!

We’ll look at the Reviews summary, first, to make sure the restaurant isn’t a one- or two-star loser that we’d *never* try (and personally, it’s unlikely that I’ll try a 3-star place). Four- or five-stars and we’ll probably read several of the reviews to understand what people liked and disliked, from which we can form a more considered assessment. Five-star ratings would cause many of us to research what patrons recommended.

Analyzing the reviews is the extra step, similar to the difference between a Sales Qualified Lead and a *Demo* Qualified Lead. We as the vendor need more information, *critical* information, before investing time in a demo.

BANT and similar qualification methods don't provide enough evidence to avoid delivering a wasted demo. Vague generalized "needs" are equivalent to the opening hours and location of a restaurant. We need more specifics, like reading the reviews!

Great Demo! Situation Slides provide these insights:

Job Title:	Who is this demo for, specifically?
Critical Business Issue:	What is their top-level goal or objective?
Problems/Reasons:	What is making it hard for them to achieve their goal or objective?
Specific Capabilities:	What *specific* capabilities do they need to solve their problems?
Delta:	What is the tangible value of making the change?
Critical Date:	When and why do they need to have a solution in place?

A complete Situation Slide represents a Demo Qualified Lead and provides you with two keys to prevent wasted demos:

1. The Specific Capabilities tell you *exactly* what you need to show in your demo (and what to avoid!).
2. The presence of a Critical Business Issue, Delta, and Critical Date significantly reduces the possibility of a No Decision outcome and its potentially *enormous* waste of time and energy well beyond a demo. (More on this later…)

What a terrific way to start a productive relationship with your prospect!

Note that each Demo Qualified Lead is for one specific job title, not a department or the entire company. This also makes these Demo Qualified Leads much more targeted than "personas," which often suffer from being imprecise and squishy!

Accordingly, each additional job title has their *own* Situation Slide. As an example, if you are selling to a sales department, you might need Situation Slides for each of the following job titles involved in the buying process:

- CRO
- VP of Sales
- Regional Sales Manager
- Account Executive
- Account Manager
- Sales Enablement
- Etc.

Each has its corresponding Situation Slide: very precise and very accurate!

Tool Number 2: A Measurement of Discovery Completeness

"How much discovery is enough?"
– Nearly every new sales and presales person…

Far too many vendor teams gather a few prospect "pain points" and declare that discovery is complete. Oh, but there's *so* much more…!

Here's the full outline of the Doing Discovery methodology, as an example of what's possible (and what *should* be done!):

Opening
- About you
- Demographics
- Company
- Team
- Workflows/processes

Environment
- Physical
- Technology/Infrastructure
- Know-how

Major Pain
- Workflow Analysis
- Do well
- Do better
- Impact
- Quantify
- Specific Capabilities
- Vision Generation and Reengineering

Extended Environment – Beyond the Workflow
- Adjacent
- Impacted

Related Pain(s)
- Workflow Analysis
- Do well
- Do better
- Impact
- Quantify
- Specific Capabilities
- Vision Generation and Reengineering

Culture
- Uniqueness
- Implementation
- Adoption
- Transition Vision

Wrap-up
- Getting worse, Do nothing
- Timing – VREs
- Drivers (CBIs)
- Final open-ended
- Mutual action plan

That's a lot to cover…! Is there an acceptable *minimum*? Well, yes and no…

In the best cases, you'll be able to uncover most or all this information. And it's *worth* it: You will be *rewarded* when you are perceived by your prospect as doing a superior job in discovery than your competition. You'll be in a competitively advantageous position.

However, due to time limitations, access challenges, or other factors, you may not be able to complete this full framework. So, what is the minimum you need to move forward with a sales or buying process?

Yes, you guessed it: a complete Situation Slide for each relevant job title! These provide *just* enough information, *key* discovery information, for you and your prospect to move forward with your processes.

Organizations that have incorporated these minimums into their sales process steps and CRM systems report improvements in their close rates, reduction of wasted demos, and substantial reduction of No Decision outcomes.

Tool Number 3: Summarizing Discovery

"If I recall correctly…"
– Great Demo! Methodology

Imagine that *you* are the prospect at a demo meeting. How should the vendor start the demo, from your perspective?

1. A corporate overview presentation, or product or architecture presentation
2. A long-winded story that has little relevance to the topic at hand
3. A crisp summary of your situation

Nearly no-one wants number one, and while a few folks might enjoy the story, if it doesn't resonate, it's just a waste of time (and executives will be the *hardest* to please).

Number three, a crisp review of your situation based on your discovery conversations with the vendor is a delightful place to begin: It's all about you! This approach has also been *validated* as a highly successful strategy to kick off a demo.

Great Demo! Situation Slides provide a simple, effective framework to accomplish this. From your perspective of being the prospect, it looks and sounds like this:

Job Title:	It's all about *you*!
Critical Business Issue:	This is your top-level goal or objective.
Problems/Reasons:	These are making it difficult to achieve your objective.
Specific Capabilities:	These are what you need to solve your problems.
Delta:	This is the tangible value of making the change, with *your* numbers.
Critical Date:	This is when you need to have a solution in place, and the driving force.

Reviewing and confirming this only takes a minute or two and queues up the balance of the demo. You're ready to see what the vendor can do to help you address your problems.

Tool Number 4: A Hero Story

"Teach Me."
– Stephen Strange, Doctor Strange

"It's good to meet you, Dr. Banner. Your work on anti-electron collisions is unparalleled. And I'm a huge fan of the way you lose control and turn into an enormous green rage monster."
– Tony Stark, Avengers

Here's a wonderful tip from Natasja Bax (who leads the Great Demo! & Doing Discovery team in EMEA): She noted that presenting a Great Demo! Situation Slide tells a simple, but a very effective hero story!

The hero (the lead prospect player) is facing a major challenge (their Critical Business Issue). As the hero embarks on their journey, they encounter numerous tasks and trials (their Problems/Reasons). While seeking solutions, the hero meets a mentor (the vendor) who provides tools and guides the transformation (the Specific Capabilities needed) which must be completed within a limited timeframe (the Critical Date). As the hero implements these solutions successfully, they are transformed and enjoy the associated rewards (the Delta)!

These stories are strongest and most impactful when they include the five key storytelling elements outlined by Chip and Dan Heath in *Made to Stick*:

1. Simple Message: The concept or message needs to be clear and easy to understand.
2. Real Experience: It must be believable and perceived as being true.
3. Element of Surprise: An unexpected twist, event or outcome generates interest and tension.
4. Evokes Emotion: The best stories are those that evoke an emotional response.
5. Relevant: Good stories relate directly to the subject or key point.

The only one of these that might be missing from a Situation Slide hero story is the "Element of Surprise." You can add surprise by exacerbating the situation with a revised Critical Date ("… and then they learned that delivery was needed two months earlier!") or a changed objective ("… and then they were told to *double* the throughput!") or similar challenge.

Another approach is to make a Specific Capability a surprise on its own. For example, "The prospect was completely unaware of how effective the new AI tool was able to generate the answer and was truly shocked the first time they saw it in action!"

Make your prospect a hero!

Tool Number 5: Vision Generation Demos

"An ad should be an appetizer, not a buffet!"
– Lee Clow

Imagine, again, that *you* are the prospect, and you've just clicked the "Book a Demo" button on a vendor's website. Do you want an hour-long overview demo (aka "Harbor Tour") or *just* enough demo to decide if you'd like to explore further?

Most of us would prefer the latter! "Show me *just* enough relevant deliverables or screens to enable me to decide what I'd like to do next," is what we'd say. And that's a Vision Generation Demo!

Vision Generation Demos have two parts:

1. A Great Demo! Situation Slide
2. One or a few compelling visuals ("Illustrations" in Great Demo! methodology)

When you (as the vendor) present Situation Slides to *summarize* discovery information for a prospect (in Technical Proof Demos), you stay in "You Mode," as follows:

Job Title:	"As the VP of sales, you told me…"
Critical Business Issue:	"If I recall correctly, you said your top-level objective is…"
Problems/Reasons:	"You said these are making it difficult to achieve your objective…"
Specific Capabilities:	"You noted that these are what you need to solve your problems…"
Delta:	"I believe you said you are looking for these tangible changes…"
Critical Date:	"And you noted that this is when you need to have a solution in place…"

However, for Vision Generation Demos, use a Situation Slide based on the experiences of other, *similar* customers with that same job title, described in the third person, past tense:

Job Title:	"*Other* VP of sales told us…"
Critical Business Issue:	"Their top-level objective was…"
Problems/Reasons:	"They said it was difficult to achieve their objectives because…"
Specific Capabilities:	"They said they needed to ability to…"
Delta:	"And by using our software, they are enjoying the following rewards…"

You then ask, "How does this compare with your situation?" Your prospect's answer guides you to the next step, where you share a compelling image or two of what your software delivers. If this is in alignment with your prospect's interests, you've satisfied their desire to "get a taste" of what's possible.

Best of all, perhaps, is that this whole process takes about six minutes. And, if you're prospect likes what they've seen and heard, they will be open to invest in a discovery conversation. What a delight!

For an appetizer-level summary of Vision Generation Demos, see this article. For the full recipe (and a great one!), read Chapter 11 in *Great Demo!*

Note (again!) that Vision Generation Demos are based on the relevant job title. You should prepare a specific Situation Slide for each job title you might typically encounter with your prospects.

Tool Number 6: A Measurement of Product "Fit"

"You've got to start with the customer experience and work back to product – not the other way around."
– Steve Jobs

Discovery is a simultaneous exploration of prospect "fit" on the part of the vendor and solution "fit" on the part of the prospect. Good fit for both parties results in less friction for all subsequent steps in your relationship. Discovery should measure fit, accordingly, and is an enormous point of leverage for everything downstream!

Prospects know this, intuitively, and often express it when they terminate a sales cycle. They'll (literally!) say, "Your product isn't a good fit for us."

Sadly, many salespeople ignore fit and instead live in the "Land of Hope," resulting in enormous waste and inefficiencies. And if the prospect moves forward with a purchase, poor fit can cause them to churn and become an outspoken negative reference.

How can we measure fit?

Great Demo! Situation Slides offer one simple and effective method (see Chapter 6 in *Great Demo!*). For each important Specific Capability desired by your prospect, assess your ability to deliver satisfaction on a scale or percent:

Workflow Number 1: 80%
Workflow Number 2: 90%
Report Number 1: 100%
Dashboard Number 1: 80%
Root Cause Identification: 60%

This can be represented, ultimately, as an overall score, either as a simple average or (better) as a weighted average based on relative importance each capability to your prospect:

Workflow Number 1:	80% fit; Relative Importance 100
Workflow Number 2:	90% fit; Relative Importance 80
Report Number 1:	100% fit; Relative Importance 100
Dashboard Number 1:	80% fit, Relative Importance 70
Root Cause Identification:	60% fit; Relative Importance 100

Incorporating the opportunity size enables you to compare opportunities to determine where to invest your resources. It also solves the challenge of the rep's traditional claim "It's a huge opportunity…!" when analyzed in comparison to others.

For example, a $1M opportunity with a 20% fit metric gives a normalized score of $200K, but a $600K opportunity with 80% fit yields a score of $480K. I know where I'd invest my time!

Tool Number 7: A Test for No Decision Outcomes

"*How* many times has this opportunity 'rolled over' to the next quarter on your forecast?!"
– Incredulous Sales Managers Everywhere

"45% of all SaaS forecasted opportunities end as 'No Decision' outcomes…"
– Gartner

"That means that nearly *half* of the opportunities you work on … go nowhere! Would you like some of that time back in your life?"
– Me

Here's a largely true story:

At a QBR, the sales team was discussing forecasted opportunities that never seemed to close. There was a great deal of speculation, but nothing concrete until a senior presales staff member spoke up.

She said, "You'd asked me to check out the Great Demo! & Doing Discovery Workshops, as a scout, to see if we might want to train our team on these methodologies. Well, I may have a simple, discovery-based solution for you!

In our training, the facilitator identified three parameters that consistently identify an opportunity as a likely No Decision outcome." She went to a whiteboard and diagrammed:

1. No Critical Business Issue
2. Insufficient Value
3. No Critical Date

She explained, "A Critical Business Issue is an annual, quarterly, or project-based goal or objective that is at risk. 'Pain' is the set of one or more problems or reasons that are causing an inability to achieve the goal or objective. However, "pain" by itself is *not* enough to drive a purchase."

She chuckled, adding, "In the Workshop, the facilitator commented that 'People will live *forever* with the hell that they know unless it impacts their ability to achieve their objectives!'

That's probably why we see many deals go to No Decision even though we've identified their pains! In our discovery conversations, we need to determine if our prospects' pains are impacting their ability to accomplish their objectives – and, specifically, what those objectives are. Those are their Critical Business Issues."

Several of the meeting participants nodded their heads in agreement. One shared an example where pain had been identified by the salesperson and confirmed by the prospect, but it was clear that a Critical Business Issue was lacking. That opportunity had been expected to close for several quarters: Clearly it was a No Decision outcome.

Continuing, she directed the group's attention to number two. "Insufficient Value is the second element," she said. "In our Workshop, we learned that value needs to be uncovered, and it must be *tangible*! It can't simply be 'cheaper, better, or faster,' it must be quantified. We need to help our prospects build their business case using their own numbers."

A sales manager added, "Oh! And we may need to help guide our buyers and champions, depending on their level of experience." That caused more head nodding, and a few Europeans knocked their knuckles on the table in agreement as well.

"The third factor," she continued, "is the lack of a Critical Date. And this isn't *our* end of quarter, as much as we might want it to be!" This generated some laughter as well as a few sheepish looks.

"A Critical Date is a date by when our prospect needs a solution in place and operating," she said as she strongly emphasized the word *when*. "It also needs to include the reason for the Critical Date: the driving force. For example, a good Critical Date for a prospect could be the renewal date for a system they want to replace. The date might be March 31st; the driving force is the need to avoid paying for another year's license."

More heads nodded; more knuckles knocked.

She laughed, "In the Workshop, the facilitator asked us, 'In university, would you have ever completed those papers if you didn't have a due date?' I know I wouldn't have!

We learned that if any one or more of these three parameters are missing or incomplete, it dramatically increases the likelihood of a No Decision outcome. Best of all, these are all elements that we should be able to uncover in our discovery conversations, early in the sales cycle."

And where do you find these three parameters? Right here, in bold!

Job Title:	Prospect's Job Title
Critical Business Issue:	**Their top-level goal or objective.**
Problems/Reasons:	These make it difficult to achieve their objective ("pain").
Specific Capabilities:	These are what they need to solve their problems.
Delta:	**This is the tangible value of making the change; the prospect's numbers.**
Critical Date:	**This when they need to have a solution in place, and the driving force.**

Imagine what you could do with the time you'd recover by reducing your No Decision rate by 10% or 20% or more!

Bonus Tool: Selling Internally

"Price is what you pay; value is what you get"
– Warren Buffett,

Many years ago, when I was a young product line manager, I realized we needed a tool to track enhancement requests, bugs, and plans for new capabilities. It was clear that we needed a solution, and I found a product that fit our needs nicely.

The price seemed reasonable for our organization, but beyond my spending limit. I went to our CFO to ask for the funds, thinking "This should be a 'slam-dunk' – no problem!"

He said, "No."

Surprised, I asked, "But why?" He explained, "Look, Cohan, you've asked for $24,000. Part of my job is to determine the best way to invest our money. Right now, I can generate 6% annual interest on that 24K in Treasury Bills. What will be the gain to the organization from *your* proposed purchase?"

There was a silver lining to this: Our CFO was also a wonderful mentor to me. He walked me through the cost justification process that I needed to secure the order, and I dutifully went to work to gather the numbers. A few days later, I presented my findings and was granted the funds for the purchase!

One of hardest jobs for inexperienced buyers (at any level) is to put together compelling cost justifications. But there's good news: Situation Slides provide a terrific template to start from!

Here's the "selling internally" perspective using a Situation Slide (first-person singular):

[Job Title:	The person who is "selling internally."]
Critical Business Issue:	The top-level goal or objective I need to achieve, that is at risk.
Problems/Reasons:	What is making it difficult for me to achieve my objective.
Specific Capabilities:	The capabilities I need to solve my problems.
Delta:	The specific value that will be returned to our organization.
Critical Date:	The date by when I need the solution in place, and the driving force.

As the vendor, enable your champions and your buyers by providing them with the relevant Situation Slide(s) they need for their internal processes!

Seven Tools

That's seven terrific tools in your Situation Slide Swiss Army knife. Perhaps you'll find more!

To learn the methods introduced above, consider enrolling in a Great Demo! Doing Discovery or Demonstration Skills Workshop. For more demo and discovery tips, best practices, tools and techniques, explore our books, blog and articles on the Resources pages of our website at https://GreatDemo.com and join the Great Demo! & Doing Discovery LinkedIn Group to learn from others and share your experiences.

