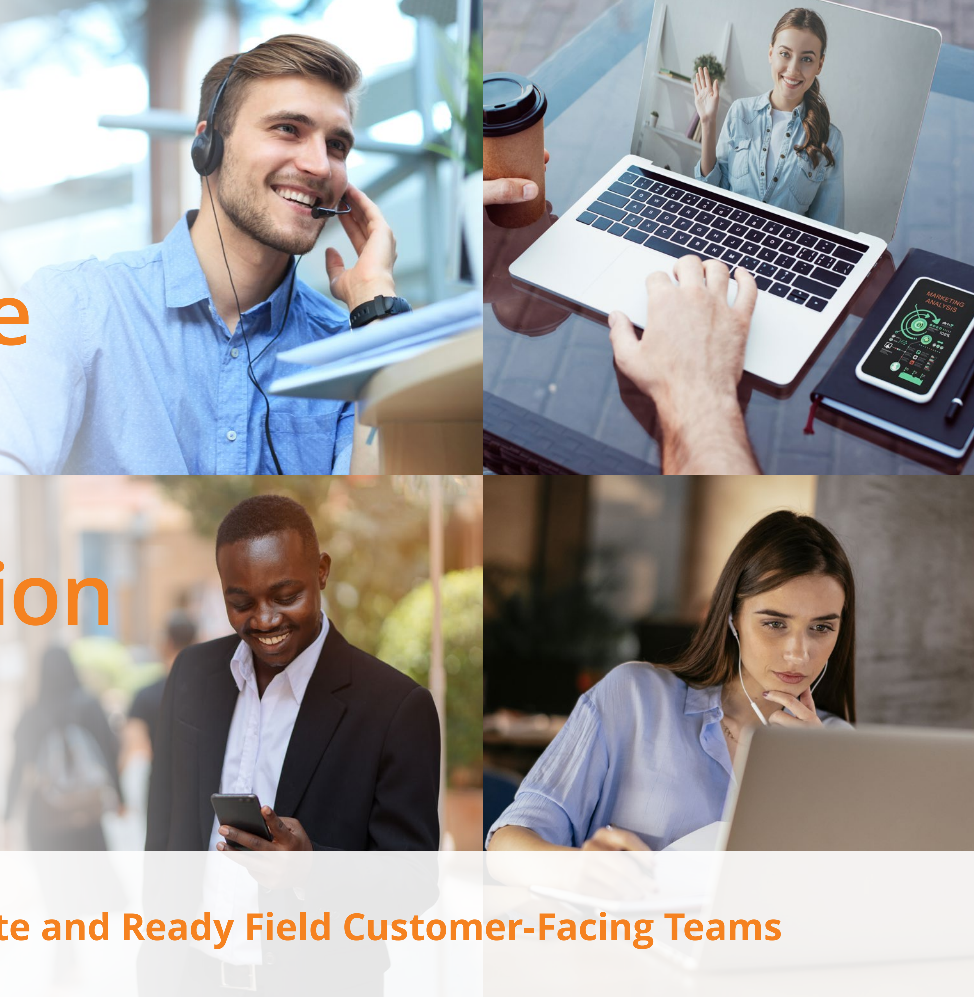
MindTickle

The Complete Guide to Remote Field Communication and Updates



Align and Inspire Your Remote and Ready Field Customer-Facing Teams

The prevalent pandemic has resulted in a significant jolt to most businesses, disrupting plans and planned projects like no time before. As a result, most leaders are in the process of revisiting their strategies, particularly for Go-To-Market areas. Almost every company has formed a cross-functional response team whose objective is to assess the areas that need to be revised and execute on new or updated strategies, whether a new product update aimed at remote functioning, or an updated sales asset, or in some cases a new pricing package.

Recent findings from Forrester Research reveal that employees trust their organization as a source of truth for pandemic news more than they trust governments and social media sites. As the development of new information increases so does the challenge of ensuring customer-facing teams are aligned, equipped and able to deliver value in day-to-day conversations with prospects and customers. In adopting and optimizing the best communications strategy and platform to engage field teams; management and support teams alike must keep these questions top of mind.

Some key questions to answer are the following:

- Is the field team aware of the new updates being generated by the response team every week?
- Does the field team know where to access the latest and greatest talking points, at any time, especially before a customer call?
- Is the field team engaging with the training you're pushing out to the team?
- Are the materials you're developing in tune with what the field team is actually hearing from prospects and customers?

- As enablement leader, can you provide visibility to your leadership team around the readiness and responsiveness of your field team to the response strategy?
- Does your field team feel connected and engaged with the company leadership and business strategy, in these uncertain times?

Key Questions to Guide your Communications and Updates

As businesses address the challenges of managing and engaging a remote workforce, reset or rework revenue and retention targets, leadership must adopt a "Remote and Ready" mindset to engage their teams frequently and transparently. At the core of answering these questions is a Field Communications and Updates program that inspires and excites your workforce with relevant, usable information in bite-sized pieces while leveraging tools such as gamification and community to drive consistent participation and long-term engagement.

Use this blueprint to deliver consistent communications to inspire and engage your remote sales teams.

Elements of the Field Communications Program—Total Consumption Time 20 minutes

Introduction—Agenda

Leadership Updates—Short video and state of the state

Market Validation and Industry Update—Competitor updates and business trends

Customer Showcase—Case Studies and Stories

Partner Showcase—New partners and existing joint activities

Product Marketing—Product updates, messaging, objection handling

Content Marketing—New collateral, blog posts, ebooks

Feedback from the Field—Prospect comments, effectiveness of messaging

Resources—Training schedule, events, campaigns

Experience

Timing: The cadence and time when these updates are published are extremely predictable, for example, a weekly cadence with the update reaching the team's inboxes late Sunday nights.

Content size: Bite-sized and gamified content ensures that the team is spending the right amount of time needed to keep themselves updated. You don't want this to be looked at as another compliance activity in these times. They can always come and review the content as needed.

Content type: Content should be a good mix of multimedia (short 3-5 mins videos) and readable materials such as data sheets, presentation decks and marketing collateral. Where possible, include the transcripts for videos because people have different preferred ways of consuming information.

Content objective: Every piece of information that is included in the update should be created based on "What's in it for the individual?". While it may not be necessary to explicitly call out, having a clearly defined objective / Call-To-Action against each piece of content helps tailor it for maximum effectiveness.

Content

Leadership videos and podcasts: In these times where we are working remotely and deskless, regular communications between leadership (e.g. CEO, CRO, CMO etc.) and the team is more important than ever. At MindTickle, for example, we have at least one 5 minute video from our CMO every week summarizing the key developments we are hearing from the field, how the company is responding to them, and an introduction to what's coming up in the rest of the update.

Action Items:

- [ ] **Publish 3- to 5-minute videos or 4- to 6-minute podcasts of senior leaders speaking to the sales organization.**
    - ✓ Depending on your cadence, this program can be run with minimal effort and be guided by incoming questions from the field. Videos and podcasts with senior leaders can be done with the following:
        - Webcam
        - Voice-over PowerPoint
        - Screen capture
    - ✓ Host special guest speakers, like top performers within the company or key partners, to inspire the organization and bring in new perspectives.

3rd party content: Don't feel pressured to develop all the content internally. Allocate some percentage of time to review valuable, often freely available resources being published by analysts, customers, industry forums and communities, and content repositories. By curating and linking to relevant and contextual snippets of these content, you will build credibility while cutting through the noise these assets often create in mailboxes.

Clear, prescriptive and actionable: The biggest value your field team can drive today in customer engagements is clearly communicating how you can help them in these times. In order to help your team deliver that, don't leave any element of these updates to guesswork or interpretation. Over-communicate in terms of how each and every item in the update can be leveraged in customer interactions.

Action Items:

- [ ] **Provide guidelines and/or an outline for consistency for different presenters. For example, you can set up a communication series in a sales readiness platform such as MindTickle along these themes:**
    - ✓ Leadership Communications
        - Major market or board updates
        - Company updates
        - 'Informal' fireside chats with Q&A
    - ✓ Sales Communications
        - Quick and informal updates (sales wins)
        - Market changes or competitor updates
        - ILT for webinars or seminars
    - ✓ HR
        - Company intranet information and where to find resources
        - Employee newsletters
        - Corporate culture
        - Employee manuals and handbooks

Power the information loop: Tap into your Customer Success and Marketing group to understand how your customers are adapting to this new reality, and identify best practices that can be shared. Turn these into useful market-facing materials (without violating any customer reference permissions) that can be used by the prospecting team. In the same way, relay the things that your sales and solutions team is hearing to the Customer Success group so that they can help existing customers.

Action Items:

- [ ] **Designate your field team members (e.g. Customer Success, Technical Sellers, etc.) as subject matter experts and interview them on a specific set of topics, or upload customer and team conversations that discuss the topic.**
- [ ] **To repurpose content, develop an outline or framework for specific issues such as use cases and have SMEs record videos and podcasts.**

Feedback and Polls: One of the most important aspects of this update is to collect feedback from the field - both in terms of what they are hearing as well as the quality and effectiveness of these updates. This informs the decisions such as what topics you should prioritize for the next week(s), and how you can update the content to improve usability for the team.

Action Items:

- ☐ **Introduce an anonymized feedback tool through which employees can submit questions, concerns or feedback.**
  - ✓ Survey sellers or customer-facing teams on their immediate challenges, such as lead generation, self-prospecting, objection handling and navigating business when people don't want to be sold to
  - ✓ Compile (or have participants submit) examples of live prospect calls and online presentations where they encounter objections, pain points, and potential use cases among others. Collate and distribute feedback and incorporate input on structuring content into upcoming all-hands calls
  - ✓ Based on field feedback and market intelligence, invite contributors from cross-functional teams to present on key topics and answer seller questions (e.g., Product team to address roadmap questions; Product Marketing to position new messaging or competitive battlecards based on market changes)

Impact Measurement

Participation: The most basic metric to start measuring is completion rates. For the first few times, participation from the team may require encouragement from enablement leaders and management, but as they start appreciating the value of the communications, the participation and completion level will increase.

Engagement and Feedback: With the help of your sales readiness solution, you can extend the engagement metrics beyond attendance and participation. Leverage the following measures to monitor engagement:

- ***Open feedback:*** Each week's update can have an open-form comment object. This serves as a place where the field team can share feedback on what they are hearing from the field (helps prioritize some of the areas for the cross-functional team to focus on), and what they like / dislike about the field communication series (helps you make improvements to your workflows as well as the content delivery best practices). This is the most critical mechanism for measuring engagement as well as knowing what's working and what needs improvement.
- ***Content Effectiveness:*** In addition to the feedback, measure the amount of content consumption (especially when there is a drop off) to understand the right balance of duration and medium for delivering impactful content to the field. For example, is there a significant difference in the consumption of a 5-minute video vs. a 10-minute video? How does that improve with a shorter 5 minute video? While most of us have established guidelines on these best practices, keep in mind to reassess them in the light of the fact that most of the employees are now working from home during a pandemic possibly with family and children.

Action Items:

- ☐ **Conduct short surveys and quizzes after each communication to measure engagement and gather reactions; address any questions during a dedicated communication at the end of each week or month.**
  - ✓ Leverage quizzes to measure engagement, knowledge retention, and understanding of communicated expectations

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- ✓ Glean insights from anonymous surveys to improve internal communications
  - New ideas or concerns can inspire discussions or training materials for the next round of communications
- ✓ Address common questions in a FAQ

Knowledge absorption and retention: The objective of the field communication is to engage the team and keep them up to date, and not necessarily designed to be a training or certification program. That said, leverage the gamification and test to teach capabilities of MindTickle platform to assess immediate knowledge retention. As an example, follow-up a customer deployment video with a simple question or two to ensure the team reviews those most critical aspects again, and retains relevant information for a longer period of time. Also, the leaderboard is an effective tool to drive an informal, internal contest.

Action Items:

- [ ] **Post the recorded communication and accompanying materials in your readiness library for people to revisit as needed.**
  - ✓ Push these bite-sized pieces of information (e.g., messaging, value proposition, competitive updates) to sellers' mobile devices to reinforce key learnings
- [ ] **For more significant information, especially ones that impact messaging, publish virtual role play exercises separately to ensure that the team is internalizing the information shared and ready to articulate it in a customer conversation.**

About Us

MindTickle provides a comprehensive, data-driven solution for sales readiness and enablement that fuels revenue growth and brand affinity. Its purpose-built applications, proven methodologies, and best practices are designed to drive effective sales onboarding and ongoing readiness. With MindTickle, company leaders and sellers can continually assess, diagnose and develop the knowledge, skills and behaviors required to effectively engage customers and drive growth.

Companies across a wide range of industries use MindTickle's innovative capabilities for on-demand, online training, bite-sized mobile updates, gamification-based learning, coaching and role-play to ensure world-class sales performance.

MindTickle is a global, privately-held company headquartered in San Francisco, CA.

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