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## e-Xpertise in Industry Issue #40

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### Quote for Today

**Hope is not a strategy.**

**Rick Page**

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## Lessons Learned

by Edwin Ecob

Over the last 10 years, Cambashi has been organising, developing and delivering industry-related training programs to help customer-facing staff understand the activities and business priorities of the industries they serve. This seems like a good time to reflect on what we have learned during that time.

You may recognise some of the observations – and I welcome your comments. Send me an email at ([edwin.ecob@cambashi.com](mailto:edwin.ecob@cambashi.com)).

### Audience

- Our usual audiences, sales and pre/post sales support people, are generally bright, enthusiastic and focussed on performance. Both course content and delivery need to reflect this.
- Having said that, it is difficult to obtain an accurate assessment of the knowledge level of the attendees, and there is often neither the time nor inclination for a skills audit before the event. As a result it is important to neither under-estimate nor over-estimate the audience's knowledge – chances are there will be a wide range of experience.

### Corporate commitment

- Whilst product training is considered mandatory, gaining an understanding of their potential clients' businesses via industry training is generally seen as a "nice to have" rather than a "must

have.” In fact Michael Bosworth makes “situational fluency” a cornerstone of *Solution Selling* in his book of the same name. It often requires senior management support to make this type of training happen in the face of a real or perceived loss in “selling time,” budget constraints and so on.

- Following on from that, senior management reinforcement is extremely valuable in “motivating” the group who attend the course. Here are a couple of examples from instructor-led, in-person events:
  - A notable introduction from a EMEA Sales VP set the tone for one event: “ I can’t promise that by attending this course you will get promoted .....but if you don’t attend I can guarantee that you won’t!”
  - At another 2-day event in Asia, the country manager of a well-known IT company set the ground rules to any sales person who was thinking of doing something else – including customer visits: “This course is so important I am going to be here for all of it. So are you!”

### **Content and structure**

- Over the years we have found that many of our clients have similar requirements when it comes to industry content. Most want us to provide a basic introduction to manufacturing and production as well as a more detailed look at specific “vertical” industries.
- It may be possible to address some of the basic concepts by pre-class reading but, in our experience, pre-work is rarely done without clear management leadership.
- For the material to be both engaging and useful the attendees need to understand how it can help them achieve their objectives (quota, lead generation, etc.). Making the connection between a typical company’s business needs and our client’s product(s) or solution(s) is a popular and effective way to do this.
- Whenever the delivery method permits, some form of interactivity is highly desirable. This isn’t an arbitrary desire by trainers to extend the length of courses – and their fees. All teaching and learning experts agree that participation is essential if learning is to occur - the “experience – reflect - learn” virtuous circle.
- There are ways of achieving this in most of the delivery methods identified below. It is easiest during instructor-led in-person classes and where workgroup activity/interaction should occupy over 50% of the allocated time.
- Interaction between participants – war stories, etc. – can be one of the most useful parts of the event.
- In terms of attendee focus and achieving a productive outcome, nothing beats role playing – especially when external executives are involved.

### **Delivery methods**

- For a variety of reasons – time, cost, convenience, etc. – clients need training courses to be delivered in a number of different formats. For providing information, and to a certain degree - understanding, some of the online techniques such as online self-paced training via web meetings work well. When a change of behaviour – for instance selling to line of business executives rather than the IT group – is required, the results delivered by in-person training are the most effective.
- Interaction during live online classes is best when the numbers are small (6-8). I have attended a 3-hour online class where levels of both attention and interaction were excellent.

### **Course assessment**

- The quality and suitability of courses can often be assessed by a regulatory body who then issue accreditation certificates subject to a successful post-course test. Our online courses have been through this process.
- In-person courses have two aspects:

- Course content, trainer performance, materials, etc. are usually assessed based on attendee feedback where an overall average score is calculated.
- Attendees can be assessed by a pre and post course test to demonstrate “learning.” In some circumstances, this is appropriate. However, a more meaningful, but much more difficult question to answer is, “Are people better equipped for their job than they were before the course?” Most learning will and should happen following the training itself – so getting sales management involved in assessment following a training activity enables them to reinforce good behaviour and correct bad behaviour – plus measure business related outcomes.

Creating the opportunity for people to put their learning into practice, providing support and reinforcement and then measuring success takes us back full circle to the original management initiative for training.

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## Marketing Planning

by Peter Thorne

I have always admired the definition of ‘Marketing’ created by the Chartered Institute of Marketing - “the management process responsible for identifying, anticipating and satisfying customer requirements profitably.” So many concepts embedded in just twelve words –

- A process that spans the whole company
- Responsibilities that include looking ahead as well as selecting goals and opportunities
- Activities that include doing whatever is needed to satisfy customer requirements

This last point implies getting the right products and services designed and built, making sure prospects understand the value, and making it easy for them to buy. The qualifier ‘profitably’ may need to be interpreted as ‘return-on-investment’ in charitable and public service organizations, but for the commercial sector, these twelve words articulate a scope and challenge for every marketing team.

This is the context for ‘Marketing Planning,’ the process of creating a marketing plan, the statement of how ‘Marketing’ will be delivered. Given the broad definition of marketing as above, there is a relatively small gap between a marketing plan and a business plan. Of course every business handles these things in their own way, but for now, I’ll use examples to indicate a boundary.

*The marketing plan will identify acquisition targets or categories, or a joint venture with a reseller, and the value of these initiatives, but the financial mechanisms will be planned elsewhere.*

*The marketing plan will identify new product and service concepts (or a process for generating them), and the value of new capabilities in the marketplace, but the associated development will be planned elsewhere.*

*The marketing plan will define growth and profit targets with business line and geographic breakdowns, which may lead to headcount and sales quota figures, but the associated HR will be planned elsewhere.*

The marketing plan must span these strategic issues and at the same time seek improvements in efficiency and effectiveness of tactical activity. From press releases and events to sales presentations

and collateral, it is the task of the marketing plan to get best value by prioritizing the right initiatives aimed at the right targets.

None of this is easy to do. For a global company, the diversity and complexity of both the external environment and also internal company structure may both represent significant challenges. To accommodate the scope of the various inputs that must be incorporated and views that must be provided, a marketing plan requires a structure with at least three dimensions, namely:

- Company/division/product
- Geography
- Business Process/management function

Whatever is needed, it is vital to find the level of structure and granularity that achieves effective communication with key stakeholders.

Many companies are very good at articulating corporate objectives, and they identify policies, strategies and initiatives to support these objectives. This package of corporate information acts as a platform that can cascade through the organization, with every group developing local policies, initiatives and strategies that are consistent with corporate. But for this type of process to succeed in generating a marketing plan it is vital for the reverse flow to work, to allow information generated at the local level to go back up the chain to be reconciled with the corporate view.

One of the most difficult areas to achieve this two-way flow is quantifying market opportunity. There are technical reasons for this, ranging from the definition of market segments to the handling of currencies, and the straightforward difficulty in sourcing or calculating numbers that offer the consistency, coverage and granularity that is needed. But in addition to the technical issues, there are people issues. The numbers in the marketing plan will probably establish the benchmark performance against which people, business units and products will be judged. So it is perhaps not surprising to discover concerns that the numbers in a plan have been selected to promote a hidden agenda.

The holy grail of coordinated, distributed marketing planning in a managed framework that allows 'local' plans to both feed and be guided by the corporate plan is achievable. It's challenging, and the temptations to compromise are substantial (... "here's the plan we submit to HQ, but the plan we use day-by-day is over here...."). But consider some key objectives of many large firms:

- Faster decision making
- Priority of coordinated actions over localized agendas
- Involvement and commitment of stakeholders at all levels
- Focus on the most promising opportunities

A marketing plan that stakeholders accept can be a point of reference that enables significant progress against all of these objectives. The marketing planning process deserves recognition as a core capability that drives and develops a business.

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## **Book Review: I'm on LinkedIn – Now What???: A Guide to Getting the Most OUT of LinkedIn by Jason Alba**

by Bob Brown

Happy About, 2009. ISBN 978-1-60005-136-4

I should declare up front that, unlike my children, opening MySpace and Facebook is not the natural way to start and end my day. Or, seemingly, fill much of the time in between. The same is probably true for many people of my generation – that is, the wrong side of 50. So, as a somewhat passive user, I thought it would be a good idea to try to understand how I could make better use of LinkedIn in my professional life – to understand some of the opportunities and pitfalls.

This book was one of several books on the subject that seemed to have been well-received. Although to be fair, there was nothing in particular to suggest it was any better or worse than the others.

I found the book to be a good mix of practical guidance and informed opinion plus a valuable source of references to further sources of information for additional reading on most topics. I liked the economic writing style and the objective presentation. Refreshingly, the author provides his own view of most topics but generally explores other commonly held positions – there is very little dogma or unrestrained enthusiasm to distract or annoy. If you are already a committed LinkedIn user then you may not learn very much that it is new about the mechanics of using the site but I would expect most people to come away with something of value. If you're like me and you want a reasonably quick run through the capabilities of LinkedIn, then the book is a good buy.

I would like to say that I'll be using LinkedIn much more effectively going forward – but, I suspect like many others, I still need to work at making this a natural part of my work day – rather than an “add-on.”

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