

US/Canada

CIO Business Relevance Instructor-Led Training

Instructor Guide

Version 1.0



Introduction

This Instructor Guide is the primary tool for leading participants through the *CIO Business Relevancy Instructor-Lead Workshop*. This Instructor Guide is organized to follow the modules and activities in the course. For brevity, both the guide and the course will generally be referred to as *CIO BR Workshop* in the rest of this document.

The content of this workshop was developed through several sources, focusing on three key areas:

1. Current positioning and practices regarding IT and the role of the CIO as a business leader
2. Trends in IT regarding its role in the customers' business and in the decision-making processes
3. The evolving role and involvement of the CIO in meeting the needs of the business for cost and risk management, competitive advantage in the marketplace, and agility

Information was gathered from over 36 interviews with successful sales personnel on best practices, plus additional interviews with CIOs and industry sources, both internal and external.

It is strongly suggested that any facilitator continuously update their understanding of solution positioning, trends in IT and the role of the CIO to remain current in the delivery of this workshop. Suggested sources include:

- www.cio.com
 - CIO Study: State of the CIO
 - CIO Executive Council
- www.gartner.com
- www.cioleadershipcenter.com
- www.cfo.com
- Business journals and weekly / monthly magazines
- *Partnering with the CIO*, Minelli and Barlow, John Wiley & Sons

How to Use this Guide

Use this guide during the CIOBR workshop presentations and discussions, as it provides tips and suggestions about the scope of content, activities, and content needs. It will also be helpful to review the notes on each slide used during the workshop, as those notes help define key concepts and applications for the concepts discussed on each slide.

Review this guide before the workshop and use it as your outline during the workshop.

Course Description

This section of the *CIOBR Instructor Guide* tells you, the facilitator, about the organization and structure of the course, and offers guidelines and tips for managing the workshop environment. A unique and valued aspect of this workshop is the role of former CIOs, who will participate as a co-facilitator to provide direct feedback to the attending Account Managers (AMs) regarding their analysis and plans throughout the two days.

Program Goals

The goal of the CIOBR Workshop is to provide participants with relevant tools and knowledge that will impact their ability to communicate effectively across all stakeholders in accounts that lead to long-term, sustainable business. In order for an Account Manager to operate at maximum capacity, there are three levels of competency that must be addressed:

- Phase 1: Baseline sales competency
- Phase 2: Technology relevance across multiple technology areas
- Phase 3: Business relevance

CIO-BR addresses the third phase—business relevance. In order to work effectively at a strategic level, Account Managers (AMs) must be given a significantly higher baseline from which to operate, one which incorporates basic sales competencies and technology relevance with **business-relevant communications** based on **strategic, executive conversations**.

This curriculum challenges AMs to develop their ability to understand the customer's business and the role of the CIO in achieving business goals and objectives, therefore becoming relevant to the CIO in their evolving role as a business strategist. The goal of this course is more than just to “have an intelligent conversation” with the CIO—the goal is to develop an ongoing relationship with the CIO as part of a comprehensive, multilayer account strategy.

Performance Objectives

At the end of this training, participants will be able to:

- Understand the challenges and motivations of CIOs in the evolving role of IT within the customer
- Help CIOs create business value
- Specifically align selling strategy to the CIO's goals and objectives
- Gain confidence and equal business stature as a business partner
- Create opportunities with CIOs with a business focus

Outcomes

The outcomes for the Account Managers will be:

- The CIO will look to the AM as a trusted advisor who provides strategic value.
- Technology silos will become integrated solutions across a wide spectrum of applications within their customer accounts.
- The AM will no longer have just business reviews / briefings every quarter or year; instead, the CIO will engage them for strategic IT guidance to help them carve out success in their own companies' future.

Prerequisites

The CBR curriculum is designed to build on and reinforce existing next-generation sales training programs:

- Phase 1: The Sales Masters program provides AMs with a baseline of generalist sales skills. Several AM's have also taken the Executive Conversions Workshop that can only heighten these skills.
- Phase 2: The STI, DCDW, and UCBT programs build on the Sales Master baseline skill set by providing a technical framework that enables AMs to qualify opportunities, to broaden their working portfolio from products to horizontal solutions, and to communicate the value proposition of Security, Data Center, and UC solutions to Technical Decision Makers.
- Phase 3: CBR is the keystone that completes the structure of an executive-level, strategic sales competency by preparing AMs to engage in business-relevant communications.

The following prerequisites are therefore recommended for participants who plan to participate in the CIO-BR curriculum:

- Sales Masters Training Level 1
- and 2 of the following 3 courses:*
- Security Training Initiative (STI)
 - Unified Communications Business Transformation Workshop (UCBT)
 - Data Center Discovery Workshop (DCDW)

Note Participants should be sent a pre-course guide that includes brief exercises that each participant should perform before attending the workshop. It is important that participants complete the pre-course work to identify a key customer and CIO that they wish to refer to during the course, and answer some questions about that customer and CIO to stimulate analytic thinking.

If any participants have not completed these pre-course exercises, ask them to do so during the first break.

Target Audience

The target audience for this program is:

- Selected RMs, MCOs, SEMs, AMs, PSSs and CAMs from the following segments:
 - Enterprise
 - Commercial
 - SP
 - Channels
 - Public Sector
 - CA
 - Global 3.0
 - AT

Instructional Approach

This workshop is divided into 5 modules plus an introductory set of slides. The material is covered in 1.5 days. The last half of Day 2 is dedicated to a CIO Roundtable discussion panel, which is explained below.

Co-Facilitation

You will be co-facilitating the workshop along with an actual CIO who will provide “color commentary”. The CIO co-facilitator will add to the discussion and respond to attendees’ direct questions.

Pre-Course Work

Prior to the actual classroom training, all participants will attend a 30 minute briefing call to outline the workshop objectives and agenda. Additionally, attendees will be required to complete a worksheet in which they will identify a specific customer and CIO with certain positioning questions; they will use this customer and CIO as basis for all workshops during the course.

Workshop Activities

The CIOBR Workshop is designed to take advantage of lecture, extensive class discussion, and two forms of workshop activities:

- **Workshops** are utilized to develop and understanding and plan for strategically engaging the CIO at a business-relevant level. These workshops are customer- and CIO-specific as opposed to industry or vertically focused.
- **Table Stakes** are activities that focus on required analysis *prior* to engagement with the CIO and/or their staff.

CIO Roundtable

During the afternoon of the second day, a CIO Roundtable panel discussion will be held with another former CIO participating via WebEx. The CIO Roundtable will engage two former CIO in a discussion answering questions from the attending AM regarding topics such as the evolving role of IT, and the CIO’s role and influence in the business. The follow-up questions from the attendees or the CIOs will foster valued insight into the CIOs evolving world and the AM’s plan to engage their CIO.

The specific questions and topics will be developed by the attendees prior to the COP Roundtable. You must give the attendees time to develop their questions.

Course Outline

The *CIOBR Workshop* is divided into five learning and application modules and the CIO Roundtable. As this is a very full 2-day workshop, timing for each module and activity must be carefully defined and adhered to.

1	Getting to Know the CIO
2	Defining the CIO's Business Environment
3	Strategies, Initiatives, and Innovation
4	Execution
5	Building an Account Strategy and Implementation Plan
	CIO Roundtable

Preparation

Facilitation Tips and Tricks

Adult Learning

This workshop is designed for adults. For best results, review and follow these adult learning theory tenets:

- Adults learn because they want or need to learn; training must be clearly relevant and applicable.
- Adult training must include both intellectual understanding and behavioral demonstration; include practice opportunities to develop new skills.
- Adults are self-directed; their understanding of “what’s in it for me” motivates them, rather than directives from the trainer.
- Adults bring life experiences that can either help or hinder learning new skills. Acknowledge their expertise, show how to build on that knowledge, and challenge them to do things differently than they’ve “always done” and to learn new skills.
- Adults learn best with a variety of methods; where appropriate, include activities for small groups, individual study, and large groups. Accommodate auditory, visual, and kinetic learners.

Training Tips

Conducting a workshop differs from making a presentation. The main difference is that in a workshop your audience participates. They actively engage, answer questions, participate in interactivities and contribute ideas. They are not passive; they are active.

If you have never conducted a workshop before, it’s highly recommended that you take a course on facilitation. To facilitate means “to make easy”: to help students learn in a way that builds on their prior experience, skills, and knowledge.

Whether or not you take a facilitation course, learn and practice these key facilitation skills:

Involve your participants. If you talk more than 10 minutes without involving your group, your workshop might be tedious and your learners might become bored. Ask questions and conduct labs, written exercises, and group discussions so your group can fully participate in the learning process.

Whenever possible, ask first. Before you launch into a topic, find out what your audience thinks and what experiences they've had with the topic. This helps you assess their level of knowledge and experience. By establishing a baseline of knowledge with them, they'll be more open to what you have to say.

Wait for responses. When asking a question like “What is your experience with firewalls?” be sure to *wait* for a response. Trainers are often afraid of silence—don't be. If you leap into the silence, your students will see you're not serious about involving them and will become passive. Give participants a chance to think, and if no one answers, patiently ask again. You'll usually get a response.

Class Preparation

Prior to Class

1. Schedule class & briefing
2. Send out invitations to the briefing & actual workshop
3. Distribute pre-work and student guide
4. Review instructor guide and rehearse
5. Add any software-specific orientation slides

Day of Class

1. Log on 30 minutes early
2. Load appropriate slides
3. Verify any URLs are still valid
4. Test audio
5. Enable recording
6. Make sure the Introduction slide contains the correct photos and information

During Class

1. Limit distractions
2. Keep enthusiasm high through class
3. Remember to periodically check in with participants to ensure engagement
4. Provide contact information and office hours
5. Circulate the roster and forward as directed in cover letter

Classroom Preparation Checklist

Arrange for proper classroom setup with four tables of four or five participants per table.

The classroom should include the following items:

- PowerPoint slides
- Instructor Guide
- Participant Guides
- All video and presentation executable files from the laptop
- Any additional handouts or PDFs
- Roster – instructor will receive before class as e-mail with instructions

Participant Materials

Ensure that each participant has been provided with the following materials:

- Student Guide
- Class Handouts
- Pre-work document

Agenda and Suggested Timings

Day 1

Introductions	8:30 – 9:00
Module 1: Getting to know the CIO	9:00 – 10:30
Break	10:30 – 10:45
Table Stakes #1: Rebecca Jacoby VoD	10:45 – 11:00
Workshop #1: Understanding the CIO	11:00 – 11:45
Lunch	11:45 – 12:30
Module 2: Defining the CIO’s Environment	12:30 – 1:30
Break	1:30 – 1:45
Table Stakes #2: Major Trends	1:45 – 2:05
Workshop #2: Gathering Insights	2:05 – 2:35
Module 3: Developing Value Prop	2:35 – 3:50
Break	3:50 – 4:05
Table Stakes #3: Governance Process	4:05 – 4:15
Workshop #3: Value Proposition	4:15 – 5:00
Close	5:00

Day 2

Recap of Day 1	8:30 – 8:45
Module 4: GOSI Framework	8:50 – 9:15
Break	9:15 – 9:30
Table Stakes #4: Linking IT to Business	9:30 – 9:45
Workshop #4: Second Meeting	9:45 – 10:30
Module 5: Account Plan / CIO Roundtable	10:30 – 11:00
Workshop #5: Building Your Account Plan	11:00 – 12:00
Lunch	12:00 – 1:00
CIO Roundtable	1:00 – 3:30
Break	2:15 – 2:30
Closing Comments	3:30 – 4:00

Workshop Notes

Day 1

Introduction

This brief series of slides introduces the scope, goals, and objectives for the course. It also is an opportunity for you to have every attendee participate in the introductions and learn about their background and their personal goals and objectives.

Module 1: Getting to Know the CIO

This lesson develops several key concepts that are critical for AMs to understand the personal and professional goals of their CIO customers:

- IT evolution within the business*
- The “State of the CIO” study
- The CIO archetypes*
- CIO expectations*
- The customer’s buying process: re-positioning our portfolio

Note * denotes areas of CIO commentary.

Table Stakes #1: Rebecca Jacoby

This VoD uses the insights of Rebecca Jacoby, Cisco’s CIO, to develop the concepts of business relevancy and the evolving role of the CIO. Use this VoD as a launching point to briefly discuss the following aspects of the role of the CIO:

- Vision: anticipating the future
- Strategic Focus: what are the key shifts of the business and the CIO’s role
- Executional Focus: initiatives and projects

Workshop #1: Profiling Your Customer and the CIO

This workshop focuses on analysis of the key facts that the AM must learn about their customer and the CIO in order to develop a business-relevant relationship. You should expect that the participants will have difficulty completing some sections of this account planning worksheet; the outcome of this workshop is for the AM to identify what is known and not known about their account and the CIO, and to identify areas where they need to gain additional knowledge and insight.

When you debrief with the class, focus the discussion on the relevance of the items that they documented during the workshop to three key processes:

- Value-Generating Process—understanding the customer’s business in their terms
- Strategic Planning Process—advising the CIO on technology changes that affect their business
- Execution Process—delivering on promises

These three processes were identified and discussed on slide 20 of Module 1 as areas where CIOs felt their vendors needed to improve.

Module 2: Defining the CIO’s Business Environment

This module introduces a model (GOSI) as a tool to analyze customer and CIO goals, objectives, strategies and initiatives. This analysis provides the basis for “changing the conversation” towards business relevancy, leading to potential business partnership.

Overall, the CIOBR Workshop focuses on a two-step engagement model with the CIO in this business relevant path. Both steps are based on confirming relevance to what the CIO is committed to achieve (GOSI). The first step, which is detailed in this module, focuses on the CIO’s goals and objectives, using questions to confirm relevancy and gain valuable information about the customer’s efforts. The second step (detailed in Module 3) focuses on the AM proposing value to the customer in achieving the strategies and initiatives.

Another key area to highlight in this module is the relevance of using vertical market information available via CEC and external sources to develop customer-specific analysis, thus enabling the AM to define the relevance of the technology solution directly to the customer within their market context.

Table Stakes #2: Identifying Major Trends

This brief workshop focuses on understanding available information sources, as well as the impact of trends on the AM's specific CIO customer.

Workshop #2: Your First Meeting with the CIO: Developing Relevant Questions

Using the questions developed during the pre-course work, each AM will upgrade their questions with input from a partner at each table. The facilitators should move from table to table coaching the questions and dealing with specific customer situations.

Two or more AMs will role-play with the CIO co-facilitator, followed by a class-wide debrief. Criteria for the debrief should include:

- Information gained that gave insight into the customer's specific goals and objectives.
- Ability to establish relevancy by demonstrating an understanding of the customer's business.

Module 3: Strategies, Initiatives, and Innovation

This module focuses on five key takeaways:

- IT governance as an enabler of business relevance*
- Strategic IT trends and how they impact the CIO*
- Understanding IT expenditure and priority shifts
- The CIO's role in innovation
- Value proposition development

Note * denotes topics where the CIO Co-Facilitator should deliver and lead the discussion.

The major focus of this module is the section on strategic IT trends. Each trend should be explored from two perspectives:

- How does the trend ultimately create value—and challenges—for the CIO?
- How should the AM position technology with regards to this strategy?

This discussion should not focus on technology, but rather lead into a discussion of how “Agile IT” is instrumental in managing costs, delivering shorter cycle times, and enabling IT to become more relevant to the business.

Two additional points are developed in this module, addressing spending priorities and the CIO's role in innovation. While spending will vary by industry and company, the average is 6.7% of revenue is spent on IT with approximately 36% of that on discretionary IT expenditures. AMs can be challenged to think of these numbers in terms of "wallet share", especially on the discretionary spend which is over 2¢ of every revenue dollar.

Regarding innovation, the CIO Business Strategist archetype plays a much stronger business leader role in their company's innovation. This discussion is an excellent place for the CIO co-facilitator to give example of the impact that a CIO can have on a company's strategic direction. It also has direct linkage to the strength of the IT Governance Process.

Table Stakes #3: Your Customer's Governance Process

It is rare that any of the attendees can fully complete this exercise, as the concept of IT Governance will be new to many of them. This exercise can be used as a forum to focus learning about the AM's customer. Experience has shown that understanding the IT Governance process allows the AMs to participate in a higher-level conversation.

The CIO co-facilitator lead the debrief of this exercise.

Workshop #3: Developing Your Value Proposition

Based on the concepts developed during the first day, this workshop is an opportunity for the AM to develop and practice their refined value proposition. Three potential models are provided in the courseware, including the SCIPAB model from Sales Masters (SMS).

Each AM should be given the opportunity to present their value proposition. After each presentation, spend a few minutes in a class discussion on their thoughts about each value proposition.

This is a competitive exercise. At the end of the exercise, each AM will vote for the best value proposition. The winner can be announced at the end of Day 1, or during the introduction to Day 2. Consider providing a token prize in addition to bragging rights.

Day 2

Day 1 Review

Ask each participant to share 1 to 3 key takeaways from the previous day. The criteria should be that the takeaways are part of the process to developing a business-relevant relationship with the CIO. Both facilitators will expand on these takeaways via dialogue with the class.

Module 4: Execution

This short module focuses on two concepts that directly relate to building a strategic partnership with the CIO:

- Considering IT as a business, including strategic and tactical elements*
- Helping the CIO transform their business, with a direct focus on three technologies that enable business transformation:
 - Unified Communications
 - Security
 - Data Center

Note * The discussion on business transformation should be led by the CIO Co-Facilitator.

Table Stakes #4: Linking IT to the Business

The value of the table stakes exercises is in understanding the customer prior to actual engagement at the CIO level. This exercise can be done individually by the group or in an open discussion. The focus should be on what the six questions are really asking, how to use that information, and how to get that information. Success stories from the CIO and the attendees validate that the information is available and how to get it.

Workshop #4: Your Second Meeting with the CIO

This workshop is focused on reviewing and restating the goals and objectives of the CIO within their company, as well as identifying three key strategic shifts and supporting initiatives. Workshop #5 will expand on these initiatives as a work plan.

This workshop should be conducted as a group exercise. Each table will have one member present their results to the class.

Module 5: Building an Account Plan and Implementation Plan

This brief module focuses on strategic and tactical account planning. Beginning with an analysis of the Business Value Sales Approach, this module quickly reviews the key components of a strategic account plan, including success criteria, decision-making process and players, value proposition, and measurements.

The majority of the time within this module will be spent in individual and group work, and planning for the CIO Roundtable.

Workshop #5: Completing the Strategic Planner

This workshop is an extension of Workshop #4 in which the participants are asked add details around their three identified strategic shifts and initiatives in order to:

- Generate revenue from a customer-valued solution
- Enhance the business relevance of the account team relationship with the CIO

The second part of this workshop is focused on developing topics for the CIO Roundtable. This represents a unique opportunity to get direct feedback from real CIOs regarding the topics discussed throughout the CIOBR Workshop, and on the AMs' strategic account plans.

CIO Roundtable

In addition to the CIO co-facilitator, at least one other CIO will join the discussion via WebEx. Give each CIO an opportunity to introduce themselves and state their expectations for the roundtable, then invite one of the AMs to begin.

Consider these tips for facilitating the roundtable:

- Ensure that every participant gets to ask a question
- Invite follow-up questions from all hands, including the CIOs; often the follow-up questions bring fuller discussion
- Make references to the course material where appropriate
- Feel free to ask questions yourself, especially follow-up questions

Closing Remarks

Using the last slide in Module 5 (“Focus and Goals”), lead a discussion on how each bullet point was covered throughout the two days, the key takeaways related to each point, and how these takeaways can be utilized by the AMs to begin creating more business-relevant relationships.

Please remember to ask the participants to complete the evaluation, which will have been e-mailed directly to each individual, prior to leaving.