



READYING YOUR POINT OF VIEW

The purpose of this tool is to help you develop a portable, pointy* point of view that travels with you into any room and any zoom. Work through the three steps to readying your POV; context, insight and packaging and you will be ready to fuel the most interesting conversations of everyone's week.

CONTEXT

Type of conversation: _____

Step of sales process: _____

Success looks like: _____

Elevation:

MACRO	MESO	MICRO
global/societal	industry/regional	local/personal

INSIGHT - DRAFT

Evidence/Receipts

- Confirming facts/data from research
- Disconfirming facts/data
- Notes from discovery
- Observations
- Inferences

INSIGHT - FINAL

People want or need _____,
but have to settle for Y _____

PACKAGING - FINAL

- Is it pointy?

PACKAGING - DRAFT

- Is there something to opt into or out of?

*Courtesy of Professor Suzanne Muchin



READYING YOUR POINT OF VIEW

EXAMPLE 1

CONTEXT

Type of conversation: Job interview (prospecting conversation)

Step of sales process: Qualifying

Success looks like: Getting invited for a second interview

Elevation: MACRO **MESO** MICRO
 global/societal industry/regional local/personal

INSIGHT - DRAFT

Evidence/Receipts

- Confirming facts/data from research - Losing to two main competitors; competition advertising heavily; they used to be only provider in this space; my own testimonials from past managers about my hustle
- Disconfirming facts/data - Just won a huge deal two weeks ago
- Notes from discovery - None yet
- Observations - None yet
- Inferences - Probably feeling lots of pressure; talent may be getting poached; company/hiring manager need a seller who knows the competition and how to draw out firm's differentiators against each of them

INSIGHT - FINAL

They want a seller who will aggressively get in front of as many of these clients as possible to preempt the competition. But right now, this person has to settle for getting beaten by the competition too often.

PACKAGING - FINAL

"You need someone to aggressively distinguish you from the competition and win back these clients. My slowest speed is fast, and that means I will get in front of more clients - sooner - with clearer differentiators. In a phrase, we will win more than we lose."

PACKAGING - DRAFT

- Competition is ABCCo. and XYZCo.
- From my research, I see at least two critical differentiators that this firm can talk about
- From my background, I move fast and I'm not afraid to aggressively seek appointments and tell this firm's story

EXAMPLE 2

CONTEXT

Type of conversation: Social (dinner with client)

Step of sales process: Proposing

Success looks like: Client and her husband walk away saying; "What an interesting person, and what a great opportunity to WORK with someone like this."

Elevation: **MACRO** MESO MICRO
 global/societal industry/regional local/personal

INSIGHT - DRAFT

Evidence/Receipts

- Confirming facts/data from research - Substack writers I like on this subject are Johansen and Murphy; main-stream media is treating this subject in a surface way
- Disconfirming facts/data - Wall Street Journal just ran a really good article on AI
- Notes from discovery - She is interested in AI; joined a task force on AI at firm; husband at Google (role unclear)
- Observations - AI has changed some of my behaviors, especially with email and calendaring on my phone
- Inferences - What people really need is better guidance about how to best work with AI

INSIGHT - FINAL

People need industry-specific, concrete examples of how AI is going to change their day, but they have to settle for either hand-wringing about doom or vague allusions to a bright future.

PACKAGING - FINAL

"I'm fascinated by AI and the changes it's bringing, but I'm boycotting the media's surface treatment of it. So I'm challenging myself to go deeper and understand how it's going to change our day-to-day behaviors. I will bet that within the next few months, AI will change two huge things in both of your worlds....A and B."

PACKAGING - DRAFT

- I'm sure they are struggling with the same things I am
- They will value specifics vs. generalizations about AI
- I'll bet that within a few months, two big things are going to change their day-to-day use of A and B