

## How to Plan a Winning Road Show

In Whale Hunting, there is often a step in your sales process that calls for your “boat” (team of salesperson and subject matter experts) to make a formal presentation of your solution or offering to the whale’s team. If you invite them to your place of business, we call it “The Big Show.” If you are visiting them, it’s “The Road Show.” When you are new to this concept of a team sale, it can make everyone very nervous in anticipation. The way to handle the anxiety is to prepare relentlessly.

When your team heads out to a customer’s location for a presentation, how well prepared are you? Sometimes you will be coming in at different times from different locations. You will probably have print materials and perhaps visual materials. Will you bring your own projector or will one be provided? Who will be at the meeting? Are you sure? Do you have an agenda—and did you prepare it or did they? Is everyone clear on dress code, time zone, directions to the correct building and the proper room?

I once drove from Indianapolis to Columbus, Ohio, for a meeting at Battelle. I had been given a street address, but when I arrived (in a downpour) I discovered that the address refers to an entire campus of buildings. I had no specific directions, no parking instructions, no phone number, nothing to point me in the right direction. From then on, I was determined to have a detailed Road Show plan!

It’s process, not magic. And like any good process, it needs to be written down, circulated, and continually improved.

**Logistics.** Work with your team to create a check list of every conceivable detail that needs to be covered. Assign responsibilities and due dates—for example, agenda completed by the team leader and verified with the prospective customer by seven days prior to the meeting. Business cards, Name Tags, Table Tents gathered and prepared. Laptop and projector packed. Spare batteries and universal connectors included. Assign the team member who is responsible for the technology. Will you need note pads, sticky notes, white board markers? We’ve all been in customer conference rooms that are bereft of important tools because they are constantly in use. If you or any members of your team have not previously visited this location, someone should call an administrative assistant at the whale and ask specifically how to recognize the building, where you should park, and how to find the office or conference room.

**Rehearsal.** You can’t have a smooth presentation involving multiple presenters if you do not rehearse. Schedule the date when your presentation must be drafted—a date that leaves some time for rehearsal. Schedule rehearsal time for your team to practice the presentation. Then invite some others to role-play the whale and invite their critique. This kind of training is invaluable for the presentation team and other company members who participate. Allow for

review and editing time plus production time. Who will bring the written documents, or will someone be shipping them ahead of time? Where will they be shipped? What is the back-up plan?

**Personal Preparation.** On a personal level, I suggest that your plan has a place for each member of your team to check off dry cleaning, shoe shine, hair cut or manicure in advance of a critical presentation. Discuss the dress code. I like my team to dress a little more formally than we expect the prospect's team to dress. If they are business casual, we will be in business suits. Talk about the little details like a purse or a briefcase—nothing tacky, nothing battered. Be sure everyone has a suitable professional case for whatever materials they need to bring. Be certain that everyone on your team has detailed directions, including names and phone numbers of people they can if they have problems. Be sure that everyone is leaving ample time to arrive and relax before the presentation. Don't schedule an arrival time that leaves little room for flight delays or traffic jams.

**Arrival.** If you are arriving separately at some distance from your home base, it's a good idea to meet an hour or so ahead of time at a local coffee shop or lobby. Calm down, review your plans, make sure everyone is set and ready to go. Remind yourselves of the outcome you are hoping to achieve. Your team can arrive at the meeting room together. But before you do, check off the last few details. Cell phones off, smiles on, handshakes firm, goals top of mind.

**Debrief.** Plan from the start to get your team together after the fact to review your performance—what went well, what could have gone better. What did you learn that you will never do again, and what did you learn that you will incorporate into future presentations.

If you ever do a presentation that is sloppy, you are sending powerful signals that perhaps you are sloppy about other things too. You will look too small and too unprofessional to do business with a big company.

But when you prepare thoroughly, you will exude the confidence that comes from knowing you have everything under control, and you will make a powerfully positive impression on your whale.

For more on this topic, read [Company's Coming!](#) (how to prepare for the whale's visit to your place) in the free membership collection of articles in Pier9, The Whale Hunters online community. (Click on "join free" on the home page). If you become a Premium Member, you can access the [Company's Coming! Podcast](#).