

Challenging Your Champion: Qualifying on Cultural Fit Lightning Session Lesson Plan

Slide 1: Welcome (2 mins):

Hello, and welcome to SiA's latest Lightning session. My name's [NAME], and I'm [TITLE] at [COMPANY]. I've been working in sales for [X] years. I'm thrilled to be your coach today and let you in on some of the practices I've found most helpful in my career.

Today, our focus is on culture fit. We will hold conversations with our prospect in order to determine if their organization is aligned with the investment, understanding, and priority that is needed to implement your solutions.

Before we dive in, let's do a quick icebreaker in the chat:

- **What ideal characteristics do you look for in companies that you do business with? Pause for 3 seconds to let learners type responses. Then read a few out loud.**

Now, a special spotlight on our coaches, all of them seasoned professionals. They'll be instrumental in guiding you through your practice activity later. Coaches, give a wave!

[Coaches wave]

Okay, before we start, I want to share some tips to maximize the benefits of these sessions.

1. **Recognize this as a safe space.** You're in a session with many others learning alongside you. Everyone is here to grow and develop, so don't be afraid to make mistakes.
2. **Embrace feedback from your coach.** A coach's role is not just to encourage, support, and motivate but also to challenge and assist in rethinking and growing.
3. **Even though it's optional, turn on your webcam.** Much of our interaction depends on eye contact and body language, so using cameras enhances the experience.

With that, let's get started!

Slide 2: Why is This Important? (1-2 minutes)

Deals close fastest when we've identified true champions. However, it's easy to mistake a prospect's initial enthusiasm or an organization's evident pain as surefire signs of customer fit. We can't know a potential client's true buy-in until we understand if they're a culture fit.

Identifying a strong culture fit early in the discovery or prospecting phase can lead to smooth progress through the pipeline, resulting in a lasting business relationship. Ignoring a poor culture fit can lead to fewer conversions, overly-demanding clients, and signs of pipeline stagnation like no shows, lack of response for proposals, and general time wasted. In this session, we'll work to identify what makes for a good culture fit, how to spot red-flags, and knowing when to disqualify a candidate if they are a poor culture fit.

Slide 3: What Do We Mean by Culture? (1-2 minutes)

What do we mean by culture fit? Culture fit is the alignment in values, understanding, and investment between buyers and sellers. We want to know if companies that we do business with take their pain seriously; if they will value our solution and our industry; and if their company is set up in a way to ensure our solutions can be properly implemented and maintained.

Let's look at an example: Say you were selling cybersecurity solutions. What would we want to know about the company to ensure that they align with the value prop you offer?

- How seriously does the company consider threats and issues related to cybersecurity?
- Is the IT team empowered enough to ensure that our solutions are properly integrated?
- What evidence is there that this company has invested or demonstrated previous cybersecurity measures?

If the answers to these questions suggest a lack of investment, experience, or desire to adapt, then the company may not be taking that pain seriously. On the other hand, it may mean that they are simply inexperienced and need proper guidance.

It is our job to better understand the companies we do business with, differentiate the inexperienced from the disinterested, and have direct conversations during prospecting and discovery that can reveal the true intentions and culture of a potential business partner. Let's take a look at how to do that.

Slide 4: Know Your Position and Stand Firm (1 minute)

Let's take a moment to reflect on our ideal clients. What are their feelings about our industry? What relevant initiatives do they invest in? How do they behave and treat the people they do business with? juk

Slide 5: Framework (3-4 minutes)

This framework will lead you through an early stage of the prospecting or discovery process to identify true cultural fit and navigate conversations dealing with poor cultural fit.

1. **Emphasize Values and Confirm Alignment:** Clearly outline the value of your solutions and how important it is that potential customers are aligned with it. Then encourage the prospect to elaborate on whether or not they align with it.

- *We work with organizations who are passionate about providing best in class training for their employees so they can maximize their potential. Is that a priority at XYZ?*
 - *We work with companies who are passionate about provisioning best in class integrated flexible solutions to their teams. Does that sound like something your team is focused on at the moment?*
2. **Evaluate Culture Fit:** Quickly gauge the prospect's alignment with your values. Be ready to follow up and push back on red flags that the prospect reveals, such as suggestions that their company ignores pain, lacks experience in your industry, or doesn't take the topics seriously. You can ask a few of these questions in succession.
- *"Why are these solutions important to you?"*
 - *"What programs or initiatives has the organization invested in so far?"*
3. **Decide on Next Steps:** Depending on how the prospect reacts, you may learn that the organization is not a culture fit. Use the following lines to address this misalignment and potentially disqualify the candidate.
- If the prospect's responses don't ensure culture fit, suggest they follow back up with their team to reassess their specific needs. Always leave the door open for future business and get confirmation on your thinking.
 - i. *I don't want to waste my time or yours. How about we loop back in six months once your team has a chance to reassess. Unless there's something I'm missing?*
 - ii. *It doesn't seem like you all are too concerned with xyz at the moment. I'd be happy to reconnect once your organization feels ready to move forward. Do you agree?*
 - If the prospect's response is sincere and affirms a true desire for the organization to invest in the product and its value prop, continue with the process.
 - i. *"Great! Excited to spearhead a new initiative with you..."*

Slide 6: Coach Demo (2-3 minutes)

[VOLUNTEER COACH] and I are going to run through TWO scenarios using the framework. In the first, we will show what it looks like to qualify a strong culture fit. In the second, we will qualify a poor culture fit.

As you listen, keep an eye on the steps shown on the slide. See if you can identify which step in the process we're in throughout the conversation!

Ok [COACH NAME], are you ready to start?

Let's go!

A: We partner with organizations that see cloud security as critical to their business and understand the implications a lack of security can cause. Is that a priority for you all?

B: Yeah, we had a false alarm. So now we understand the implications of insecure data.

A: What happened?

B: Outdated cloud infrastructure. We almost had a breach and nearly leaked customer data.

A: Sounds like a nightmare! Have you taken measures to prevent that from happening again?

B: A little but not enough. Our software's still behind the times.

A: I see. And because of the false alarm, you've realized this needs to change?

B: We just need to prioritize security, you know? Updating our cloud seems like a start.

A: Makes sense, it's relatively straightforward to solve but it takes time, effort, and money. Have you all considered that?

B: Yeah, our CTO has been driving this and he's willing to invest in the right solution.

A: Great to hear. Would your CTO be willing to have a conversation with us?

B: Hmm probably, but I need to make sure you can help first. Then I can report back and loop them in.

A: Great. I can share some past examples of how we helped companies solve their cloud challenges and if you like what you see, we can get your CTO involved. Does that sound fair?

AAAAND scene!

Show me a thumbs up emoji if you were able to identify which step the conversation had moved to as it went along.

Now let's take a look at disqualifying a poor fit.

Ok [COACH NAME], are you ready to start?

Let's go!

A: We prefer to partner with organizations that see training as critical to their business. Does that sound like you guys?

B: I can't see why not. It's definitely much needed here.

A: Why is it so needed? Have you used similar solutions in the past?

B: No way. We're still in the stone age when it comes to onboarding.

A: I see. So why then is there a need for this solution now?

B: Well, I think it's time to bring some life to the organization!

A: By "life", you mean?

B: I think we just need to modernize, you know? We haven't prioritized this stuff before, so figured I'd get the ball rolling.

A: I just want to make sure you and your team know what you'll be getting into. Would you say your HR team even wants this type of software?

B: It's actually been a minute since I've caught up with that team. I know they've been heads down on some projects for the past couple of quarters.

A: I think it would be beneficial for your sake and mine if you looped back with your team to confirm their needs. Happy to reconnect once your organization feels ready to move forward.

B: Hmm ok. Maybe this is a bit more complicated than I first thought.

A: It's definitely a lot to consider. Great talking to you. Loop back anytime.

AAAAND scene!

Show me a thumbs up emoji if you were able to identify which step the conversation had moved to as it went along.

Slide 7: Set Up The Break Out Rooms (1 minute)

In a minute we're going to be sent into our breakout rooms where you'll be practicing conversations with prospects of varying culture fit.

Remember the framework:

1. **Emphasize Value and Confirm Alignment**
2. **Evaluate Culture Fit**
3. **Decide on Next Steps**

Ok, get ready to join your groups and we'll see you all back here in a bit.

Slide 8: BORs (30 minutes)

Initiating the Breakout Room (BOR) Session: (3 mins)

1. **Recording & Prompt:** Once you're in the breakout room, the session will be recorded. This is for feedback purposes, so relax and immerse yourself in the scenario.
2. 🌟 **Time Management:** The role-play conversations are a bit longer today, so please be mindful of time. Initiate a timer to ensure the session remains on schedule. Use [an online one](#) or your phone!
3. **Introduction:**
"Hi everyone! I'm [NAME]. I work at [COMPANY] as [TITLE]. I've worked in Sales for [X] years and I'm excited to help you practice today."
4. **Clarify the Activity:**
"In our breakout room today, you're going to practice evaluating an organization's culture fit during the discovery/prospecting process. I'll play a prospect and you'll play the BDR/SDR or AE. You will ask questions in line with the framework to determine if I am a strong or poor culture fit. After the role play, I'll give you feedback on how I thought it went and what you might improve. Then we'll do a second round so you can incorporate that feedback and try again."
5. **Review expectations**
"Remember to follow the framework."

I'm sending out a link to a handout listing all the steps with sample statements and questions. You can use that to help you with the activity."

Share the link to the learner handout: [Learner Handout](#)

In addition to making sure you're going through all the steps, I'll also be paying attention to soft skills that are applicable here. I'll be looking to see if you are able to actively listen to identify cultural green/red flags and hold your ground to gently push back on indicators of poor fit.

6. **Let them know you'll be timing:** "We'll be up against the clock, so I'm going to be timing your turns. You'll each have 3 minutes to get through your conversation. When time is up, I'll spend about a minute giving you feedback, and then we'll move on to the next person."

Begin Activity

Introduction:

- "I'll randomly select one of you to start. I'll ask you to introduce yourself and your company so all of us can get to know you."

Coach Directions:

Round 1 (3 mins per learner)

1. Call on a random learner.
2. Have the learner begin by confirming if the prospect is inline with values important to your company culture, such as: "At [company], we find we work best with companies that value *[important quality]*. Does that sound like you?"
3. The coach should respond in the affirmative to suggest that you may be a good fit.
4. The learner will continue through the framework to better evaluate the culture fit.
5. Answer the questions to indicate that you are or are not a good cultural fit.
6. Give the students **no more than [3] minutes to get through the role-play**.
 - a. Use a timer to make sure they don't go over.
7. After the role-play is complete, take **1 minute to give the learner feedback**.
 - a. Time yourself so you don't go on too long.

Round 2: (3 mins per learner)

1. Go back to the first learner who went.
2. Repeat the role play scenario.
 - a. Again, make sure that the role play is complete in 3-minutes or less
 - b. (Optional) If the learner seemed to be particularly skilled in their first round, feel to improvise the conversation a bit more.

If there's extra time: Open the room up to questions. If they're hesitant to speak, ask them what they found most challenging about this exercise. Or, offer them tips and stories from your own professional experiences!

Ensure punctuality: Re-enter the main session 15 seconds prior to the session's culmination. Empower them, enlighten them, and ensure they exit with enriched expertise!

Feedback Guide:

As the learner goes through the exercise, feel free to check off the boxes below to keep track of wins and misses! This can help you highlight both their strengths and areas of improvement during feedback.

Framework feedback:

- ☐ Did they firmly position themselves in line with values that reflect their product?
- ☐ Did they ask enough questions to properly evaluate the prospects' culture fit?
- ☐ Did they delicately disqualify the prospect while still leaving the possibility for future business?

Soft Skills feedback:

- ☐ Did they push back and ask follow up questions to address red flags?

Other Tips:

- Commend students for their patience and active listening.
- Guide students who may stray from the framework.
- When learners seem unsure, prompt them to think aloud and work through their process.
- Reiterate the importance of empathy and genuine care in interactions.
- Ensure everyone gets ample time for feedback and reflection.
- Foster a collaborative environment by allowing peers to provide constructive feedback.

Slide 9: Welcome Back (2 minutes)

Alright, quick check-in. How are we feeling?

Coaches, got any golden moments to share from those breakout rooms? [Invite coaches to share their highlights from the BOR's!]

Now, we have a brief survey for you. In a moment, a poll will appear on your screen - please take a moment to complete it while we wait for everyone to return. We would greatly appreciate it. Your feedback is crucial for refining these sessions.

(SIA, please launch the poll now.)

30-second pause

Thank you for sharing your feedback!

Slide 10: Close (1 minute)

Alright, it's time to conclude this lightning session!

As we wrap up, I hope this session enriched your cold-call toolkit. With regular practice, you can transform this into your signature strength!

Here's what will happen next: After this class, your coach will email you a link containing personalized feedback on the recording of your practice from the breakout session. We strongly encourage you to watch this feedback - it's an invaluable tool for your learning journey!