

Alignment Workshop ¹

The Alignment Assessment workshop is designed to measure buyer interest in a product or service, long before it's delivered or before coding begins. This approach can also be used to test new product ideas or to estimate the impact of a product pivot, before making it.

This workshop takes on two biases. The first is our tendency to avoid things we're not comfortable doing. The second is our tendency to think we'll perform better than others.

More often than not, rather than mocking-up an idea and thoroughly testing the market of potential buyers, we begin by coding. In the process of sharing and testing our concept, we need to protect our IP (Intellectual Property). But what's worse than *not* protecting it is developing that IP and learning months later that you have no buyers.

The approach outlined in this workshop enables us to learn important details that could affect the value of our product as well as our strategy for selling it. Most importantly, it determines the level of interest in our product. Where interest is keen, we may find evaluators, prospects, and even customers.

In short, consider this template a framework for validating your product's fit with your expected target market(s), and a tool for identifying product gaps as well as opportunities.

There are 3 sections to this template:

1. Background
2. Sales Impact
3. Alignment Exercise

¹ Definition: Alignment - an arrangement in a straight line, or in correct or appropriate relative positions.

Section 1: Background / Objectives

- A. WHY do you (and your company) do what you do? [See the Simon Sinek [Golden Circle](#) video; see framework in ATTACHMENT One.]
- B. Who are your top three **competitors**?
- C. Have you identified **companies/orgs** and **individuals** that should have an interest in your product? Are these the same cos/orgs **buying from your competitors**?
- D. Have you **spoken** to any of the individuals in any of the companies/org mentioned above? If yes, **what did you learn**?
- E. Did any indicate **interest/disinterest** in your product/service? **Why** interested? **Why** disinterested?
- F. Have any **committed** (or paid) to evaluating your product or to **working with you** in other ways?

Section 2: Sales Impact

This part of the Alignment Assessment is mostly about learning how to convert statements to questions that will be used in the customer Survey. These questions are meant to open ears and initiate dialogue and not as boxes to be checked.

In particular, we focus on **problems**, **needs**, and **losses**. Why? Because discussion around each - while uncomfortable at times - is more likely to get to the heart of the (potential) customer's real issues. Not only are we looking for matches (alignment) but also for insights that may allow us to introduce our solution in ways the customer hadn't previously imagined.

A. **PROBLEM**: What **problems** (P) does your product/service solve? After stating a problem, convert it to a question as illustrated below.

- Problem Statement (P1): *Not taught at the University, many managers and company owners have limited knowledge of sales and the science behind it.*
- Problem Question (PQ1): *Given its importance in driving growth, are you concerned your sales are based more on reaction than strategy?*

P2:

PQ2:

P3:

PQ3:

B. **NEED**: Describe the circumstances that create a **need** (N) for your product. Unlike the problem question, the need question describes something that might happen in the future that could have negative consequences if not addressed.

- Need Statement (N1): *Without a sound understanding of sales or the systems and processes in place to manage sales, revenue can be like a rollercoaster.*

- Need Question (NQ1): *Are you worried that you might waste time and drive up costs without a clear and comprehensive strategy for selling your product?*

N2:

NQ2:

N3:

C. LOSS: What **losses** (L) will the prospect incur if they don't buy your product or service?

- L1: *Without effective sales execution your sales victories may prove to be revenue failures.*
- LQ1: *Are you concerned about leaving money on the table because your sales team is selling based on price and not value?*

L2:

LQ2:

L3:

LQ3:

D. Do you have an elevator pitch? (A short and simple oral statement that explains your product or service)?

[Enterprise Sales Budapest helps tech firms to develop sales mastery. Our program consists of 7 modules - from aligning with customers to closing sales with them. Are you interested in knowing more?]

Section 3: Alignment Exercise

This exercise is for those who don't have answers to 1 C, D, and E. At first, consider it a marketing survey to obtain feedback to a set group of questions from individuals that should have an interest in your product or service. Beyond this, see the survey as a means for assessing competitors and identifying sales opportunities as well as partners and investments.

STEP 1 - Identify **companies/orgs** and **individuals** most likely to need your solution. Find them on LinkedIn. Go to the company's website and invest time in understanding their business. If a public company, read their latest annual report.

STEP 2 - Use **elevator pitch** (2.D) and **questions** derived from 2 A (Problem), B (Need), and C (Loss).

STEP 3 - Prepare at least five exciting (and provocative) messages (emails and a shorter version for LinkedIn) that briefly describe the value your product offers and follow with a question from STEP 2 as your call-to-action.

STEP 4 - Connect via **LinkedIn** with a **brief message** and send a **similar message via email**. Explain that you're the "enthusiastic" founder of a startup and would like to talk or meet. (Ask for a meeting if the individual is nearby.)

If interest is low: ask why. If interest is high, ask if they would like to be an evaluator, partner, investor, or client.

ATTACHMENT One: A framework for answering **WHY**. Tell your story using the Pixar Pitch

Once upon a time there was a widowed fish named Marlin who was extremely protective of his only son, Nemo. **Every day**, Marlin warned Nemo of the ocean's dangers and implored him not to swim far away. **One day** in an act of defiance, Nemo ignores his father's warnings and swims into the open water. **Because of that**, he is captured by a diver and ends up as a pet in the fish tank of a dentist in Sydney. **And because of that**, Marlin sets off on a journey to recover Nemo, enlisting the help of other sea creatures along the way. **Until finally**, Marlin and Nemo find each other, reunite, and learn that love depends on trust.

Once upon a time _____.
Every day, _____. One day _____
_____. Because of that, _____
And because of that, _____. Until finally.

FIRST DRAFT [Examples]

Once upon a time, chronic pain patients were faced with the frustrating task of trying to explain their pain to their doctors. Often they were not believed. **Every day** patients tried to conform with prescribed treatments but tracking the effects over time was error prone. **Because of this** patient treatment was erratic and often ineffective. **And because** of this people suffered and were often prescribed the wrong treatment. **Finally**, a convenient method came along that allowed patients to record their treatment, meds, pain location, and effect on lifestyle. And to be believed by their doctor.

During the summer of 1995 two college classmates who met by chance and *disliked* each other at first, united in their *desire* to a fix *problem* that was bothering them. **Every day**, millions of new users were coming to the World Wide Web but finding what they needed was a *difficult and without structure*. **One day**, they launched a small app to crawl the web and collect data on links and activity. **Because of this**, the web became immensely more practical to use. Search and ranking were combined in one. **And because of this**, millions of users flocked to this new service with a funny name: Google.