

Mastering Technical Sales

2037 Trowbridge Drive
Newtown, PA 18940
Phone +1-215-431-1552

John@masteringtechnicalsales.com

www.masteringtechnicalsales.com

John Care, Managing Director

White Board Session #2: Remote Presentations

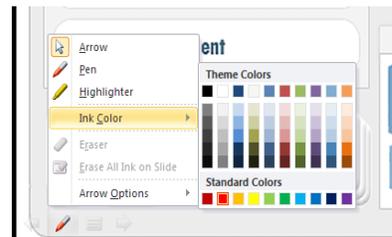
Sketching Your Architecture

My clients tell me that over 50% of their customer sales activities are now virtual – and that number is climbing. Yet I’m amazed by the lack of visual (as opposed to verbal) interaction during these sessions. When teaching my White Boarding For Sales Engineers class I consistently need to remind students that you can whiteboard within a webcast.

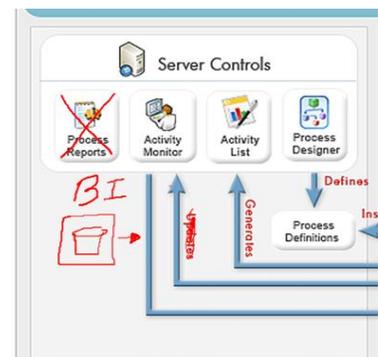
One specific example is when explaining, designing or confirming a proposed architecture with your customer. This usually involves a PowerPoint deck, exchanging Visio diagrams and a mass of words.

If you’ve ever finished up a call with an action item of “revise the diagram based on our discussion” then you’ve missed an opportunity to engage in visual selling and accelerate the sale. There are a few ways to visually diagram when selling remotely:

1. **The Mouse** Whether using a PowerPoint deck or the built-in White Board of your remote tool (i.e Webex, GoToMeeting) a mouse gives you rudimentary annotation abilities. Select your graphics tool and then apply simple lines and highlights to your architecture sketch. (Although I have yet to see anyone over the age of 12 use a mouse for anything vaguely artistic.



2. **The iPad**. There are many drawing programs you can purchase for a tablet – using either your fingers or a stylus as input. I’ve been using [AirSketch](#) and Zamurai/Logmein on an iPad Air in some of my workshops. It allows me to draw on the iPad and wirelessly project to a browser window on a PC/Mac that is then presented via the webcast. The resolution is OK for most simple drawings and sketches – and tablets keep getting better.





3. **The Bamboo Connect Pen & Tablet.** I've also been experimenting with a [Bamboo Connect Tablet](#). It plugs into a USB port and can be used in conjunction with the mouse. With a little practice, it is a neat and effective way to annotate and update a PowerPoint (see the example). It works well for adding a new component, “x-ing” out an existing component or making changes

to a data flow.

4. **The Laptop.** Most of the current generation of laptop – tablet – “do everything” devices now allow you to draw with a stylus or even your finger. Both classic Windows and Mac machines feature excellent built-in drawing functions that are pretty simple to use. With a little creativity you can also superimpose your sketches on top of a PowerPoint slide during a webcast.



So here is the takeaway – instead of verbally confirming architecture with a customer, visually confirm it as well. You will prevent misunderstandings and potentially another unnecessary follow-up meeting (or at least shorten it!).



BONUS TIP: Many of my customers now intentionally place a blank black or white slide in their PowerPoint deck for an “impromptu” whiteboard. It’s very effective.

I do this for a living. There is a complete best practice for planning and framing the content of a visual sales pitch. Should you need advice and training to create, deliver and train your teams on a memorable, but simple cloud whiteboard – [contact me](#).

"A drawing is simply a line going for a walk"

Talking Points is a monthly column authored by John Care, Managing Director of Mastering Technical Sales. For more information on this and other Sales Engineering topics visit the website at www.masteringtechnicalsales.com.

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