

Fearless Thinkers, Season 2 Episode 7  
**The 6 next practices of future-relevant organizations,**  
with Kelsey Raymond and Kendra Okposo

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**Masami Cookson:** Welcome to "Fearless Thinkers," the BTS podcast. My name is Masami Cookson, and our host is Rick Cheatham, head of marketing at BTS. On today's show, Rick sits down with Barbara Adey. Barbara is head of BTS' Sales and Marketing Center of Expertise for North America. Barbara has unique expertise in optimizing the entire customer experience, from marketing, through customer success. Prior to joining BTS, Barbara had key commercial roles in several of the world's leading technology companies. Hey, Rick, what's up?

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**Rick Cheatham:** Oh gosh, Masami, you're gonna think I'm crazy. We used to be a two-cat household, and we recently lost one of them. Believe it or not, lived to be 22.

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**Masami:** Wow.

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**Rick:** I started to feel sorry for our younger cat, and so I went on Amazon and bought him a bird feeder that sticks to the window.

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Okay.

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So now he just sits and watches the birds, but he hasn't quite figured out that he can't go through the glass. So he'll sit there and watch the birds for a minute, and all of a sudden, you'll just hear this huge thud, 'cause he will have sprinted from across the room and thrown himself at the window in hopes of catching one of these birds. But at least it keeps him entertained.

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That's too funny, oh my gosh.

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Yeah, well. We all do what we can with what we're given, right?

Well hey, it's great having Barbara back. Like me, she's done almost everything you can do in sales and marketing through the years. On today's show, we get to talk about engaging executives, and we not only hit kind of the core of the initial conversation, but possibly equally important, what does the ongoing engagement look like so that we really maximize every interaction.

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That's awesome. I'm excited to hear more about it.

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Perfect, let's go. Hey, Barbara, welcome back to the show.

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Thanks, Rick, how are you?

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I'm doing really, really well. It's this crazy moment in my life where I never expected to be here. I actually have a child getting married right now. And so six weeks, six weeks from the record date, I will be walking my daughter down the aisle. And every day that just becomes more and more surreal to me.

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Wow, well do you like the groom at least?

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Yeah, he's a great guy. He actually is a really, really great guy. How 'bout you, what's going on in your world?

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Well, I'm coming up on a personal trip to Portugal with 10 of my friends. And I'm discovering that managing volunteers is not as easy as managing a team at work. So I've had people volunteer, "Oh, I'd love to help, you know, look at the train schedules," and nothing happens. So it's one of those where I feel like I've gotta, you know, be a not multiplier and just do it myself.

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Oh, sorry for that. I get that, though. I mean, as funny as it is, sometimes it seems like leading salespeople is hard, but leading volunteers is harder for sure. Well hey, to the idea of leading salespeople, I know today we're gonna talk about, what are some best practices and our latest thinking in engaging with executives. And I'm curious just off the bat, what's your point of view on the best approach?

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The single most important thing when you're meeting an executive for the first time is to show up as a peer. Right, this person needs to understand that they're on a level with you, and they can have a conversation quickly about things that are, you know, really close to their heart. And you have to establish that connection, and preparing to do that is one of the most important things that we need to do in meeting an executive.

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I so strongly agree.

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And that's been, in my experience, the most value that you can deliver in an executive conversation is that feeling for them that they can talk about something, again, in a way that feels like they're talking to a peer. And so the key elements of getting ready for that, you need to be certainly extremely well-prepared for the conversation. You're gonna spend 20 times, at least the amount of time, versus the 20 minutes that you get with this person.

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I think too, when I imagine like who from the team to send to make a pitch, it's important to me to match the right people. I would not send a very introverted person. But if the executive we're talking to is very introverted, sometimes it's better for them to be met by someone from our team who's on that same sensibility, if you will.

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When you think about preparation, what are some of the keys from your perspective?

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So these I'm sure will sound pretty obvious, but recent investor relations reports from the company, really important. It's important too to look at what has been the industry reaction or the market reaction to recent earnings reports if it's a public company. So really understanding that financial and investor context. It's also really interesting to look at, what are some of the recent industry presentations that this executive has made, if in fact she or he has recently done so. Look at their competitors. Look at any recent regulatory developments that are interesting to them. I was meeting with chief technology officer of a company that was my biggest customer, and I brought our CIO to meet with them. And in the course of the meeting, our CIO was just having a conversation with this person. And he walked out and he said to me, "Oh, Barbara, I forgot to talk about those three things that you briefed me on." And I was like, "You know, it just doesn't matter. You know, our customer felt like you live what he lives." It really helps to match care-about, to match functional focus.

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Years and years ago, I grew up in manufacturing sales, and we were getting severe, severe price pressure. And we were having to put through price increases in a world that was very, very commoditized. And we decided who the best person would be to talk to our key accounts when we get called in front of their purchasing leads is our head of purchasing. And I'm not telling you we got all the price increases through the way we wanted to, but the peer-level executive conversation even paid huge dividends for us back then.

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The other thing that's important to remember is like executives are people too. And they can really enjoy 15 minutes, 20 minutes out of their day with someone who just engages them personally. Putting the other person at ease and yourself being at ease, besides the functional connection, it's that personal connection that is, it's an incredible achievement when you pull it off.

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Absolutely, and it's funny, because I think within that kind of circling this whole concept back to showing up as a peer, some of the very best advice I got as I started, as I grew out of commodities sales and into more complex selling situations, was when you're dealing with an executive, look for an opportunity to challenge their thinking, in an incredibly respectful way. Can't emphasize that enough. But if the style and interpersonal things feel right, then helping them to think differently is more valuable time.

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Well, and to make them think, the best thing to do is to have some good questions ready. Right, questions that will engage them, not data questions. If you ask them, you know, facts and figures questions, they'll just tune right out. But if you have some engaging questions about their business, about their role, about what they're seeing in the market, it's a great way to find the take-off point that's really gonna get you where you wanna get.

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So then, we have this good conversation. We've got some sort of agreement that I'll at least commit right now to opening your email that you send me as follow-up. But now what? We've had this first conversation, now what?

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So I am of the belief that a hard close in such a conversation is not necessarily the best. You know?

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Amen.

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So the thing to do then is, yes, make sure that this person is receptive to a continuing dialogue. And on a periodic basis, make sure to send them something interesting. It might be a position paper or a client story that your company can share. Or it might just be something about the, you know, the sport that you discussed, about golf or tennis or NCAA basketball, whatever it was that you talked about that was not work-oriented, worth remembering that, you know, and worth reaching out when there's a particular tournament being played.

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I mean, we've all heard the stories of the poor executive that has a huge sailfish on his wall, and every person that ever walked into his office wants to talk to him about his fish to the point that he finally took the blasted thing down 'cause he couldn't take it anymore. As we continue down this road, no matter who made that first call, I think probably what's possibly equally or more important is who shows up for the second one. So what's your kind of best advice for threading that needle?

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It's always a good idea to have mapped the account. And it's absolutely the case that I can have a strong conversation with the chief revenue officer or with the chief technology officer, but if it comes time to talk legal, if it comes time to talk finance, I definitely need to bring in some different people. The best way to manage that is to not try to be the only person that talks to seniors at this company. Again, we are smarter than me. If I can lever in the key people from my team that are gonna have the best conversation with some of these other executives that we need to connect with, that's gonna be the best possible situation. So it comes down to mapping, like who's the best person across the key executives, and then starting to make those introductions. I think that works better than doing an eight-legged sales call, right? That never works. It looks like the clown car.

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Right? Oh, I love the eight-legged sales call. It's easy, obviously, if some clear priority comes out of those initial interactions. It's much harder when it doesn't. My next question, curious if there's more advice you have for our audience. Okay, it went well, but there's nothing hot right now. What do you do?

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So always walk in to the meeting with a clear articulation of what does my company do and how might we be helpful. It is perfectly fine for you to leave the conversation with, "We don't have an immediate need, but given the conversation that we just had at our board meeting, it might be useful for us to talk about this topic." So it doesn't need to be like closing a deal. It does need to be establishing a line of conversation that's going to be of service to this executive.

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I'm curious as to what your experience is trying to help your executive clients network.

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So I have done that, Rick, and I've made it even easier by setting up, you know, a dinner for four people who don't know each other. You are creating the venue. You're not, it's like zero work for them to show up. And in my experience, I have created, you know, professional connections that live on much more closely than with me. It's a great service that you can provide, as you've mentioned, to help people extend their network within the industry.

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You just have to figure out, how am I creating personal and business value?

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We talked about how executives are people too. And one of the interesting things about executives is that they form a memory that's based on either what you talked about, how you showed up, what was the nugget of the conversation that really helped them think about something differently. They don't forget that. 'Cause that first impression of helping them professionally and personally really is, like that doesn't go away. It's a solid thing. If you can find that connection between what they care about, what their company is facing, and how you can contribute in some way, that's the ur, that's it.

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Well as always, Barbara, I enjoy our time together so much. Thanks for joining us today.

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It's great to be with you, Rick. Hope you have a great week and you make an excellent, excellent father of the bride.

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Ah, okay, now I'm stressed, no just kidding. Thank you.

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