

The Fearless Thinkers Podcast, Season 2 Episode 9
Keys to a great commercial kickoff
with Eduardo Umanzor, Ph.D., and Jason Davis

Masami : 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 Jason Davis and Eduardo Umanzor. Jason is a senior director within the sales and marketing center of expertise at BTS. He has over 18 years of experience partnering with clients to build sales capabilities, leadership skills, business acumen and customer understanding. His industry experience spans tech, media, education, and CPG, among others. Prior to BTS, Jason spent 10 years in various sales and marketing leadership roles. Most recently, he was a vice president of sales and marketing within the education sector.

Eduardo is a vice president at BTS who specializes in instructional design and innovation with nearly three decades of experience driving business growth, customer satisfaction, and employee engagement. Before BTS, Ed managed sales for Monster.com, and like Jason, was a vice president within the education sector.

He's passionate about creating and leading high performing teams and facilitating peak performance through mentoring, coaching, and cultivating trust-based relationships at all levels. Hey Rick, how's it going?

Rick: Doing great here. How about you?

Masami : I'm good. I just got back from yet another wedding weekend. I think it is the season of my life right now, hopping on planes, doing eight hour car rides to celebrate other people's love.

Rick: I get that moment where it just all seems to be happening, I guess.

Masami : Truly is. It's a whole lot of fun, but also a lot of traveling, so... Very happy.

Rick: Keep you on the move. Funny as you're traveling for events, what we're talking about with Jason and Ed are large scale events, whether it's a commercial offsite or a regional kickoff or whatever it is, when you're getting people together, how do you make the most of the mindset of the team?

Masami : Totally. Our own internal kickoff energizes me for the year and enables me to connect with so many people around the world that I normally don't get to see.

Rick: Well let's jump in then. Ed, Jason, welcome to the show.

Jason: Thanks, Rick. Glad to be here.

Ed: Hi, Rick. Hi, Jason.

Rick: So Ed, how are you my friend? Last time I talked to you you were in the middle of a crazy remodel.

Ed: Yeah. Still in the middle of it. Making progress, but it is a lot of work.

Rick: How about you Jason?

Jason: Oh, it's been a crazy summer with kid travel. I get a daughter who dances and she was in New York for 10 days. My son is in the middle of three different soccer tournaments, so we've been all over the place except in Chicago.

Rick: Totally get that. When mine were young, it was one of those things that it was kind of like, well, I'll take these two this direction, you take those two. Maybe we see each other, grab a burger, and trade kids and keep going.

Alright, well guys, it probably makes a lot of sense for us just to jump right in. As we think about what makes a really great commercial kickoff, actually would like to just take one step back and say, is this even still a thing? Is it important for companies to keep focusing on these very large most of the time, and frankly, very expensive events?

Jason: We're seeing a lot of focus on these still, with clients and the biggest things we're hearing the most of and why they're so important is it's a chance to, one, bring the team together. Especially over the last few years they probably haven't been together very frequently – there's a ton of value in just the comradery and the team building and the casual and social aspects there.

The other big thing we're hearing a ton of is these still remain one of the best ways to create consistency and alignment for the whole commercial and go-to-market teams. Get them all on the same page as you're going forward with customers and with segments.

Ed: Recently, a tech organization, you know, they were going through as many other organizations in the tech space. They were going through difficult times,

right, in terms of reaching their targets. But the chief revenue officer really believed that it was necessary to bring the entire organization even in the face of the mounting challenges that they had, because it was important to bring everyone together to align them on a common sense of purpose and sort of set the stage right for the organization to execute.

Rick:

At least in my experience, it's an amazing moment to get people's mindset shifted to the work that needs to be done. And I think anybody that's spent time in neuroscience kind of looks at these things and says, people aren't gonna change behavior based on information. They're gonna change behavior based on experience. Getting our sellers aligned and turning them into true believers to go take on the world, especially when times get hard, is probably critical.

Jason:

You know, we spent a year or two totally apart, totally separate, and as you talk about people changing their behaviors based on experience with others, they were alone, so they were developing behaviors in a vacuum with their customers, or the few colleagues they work with. And then you look at the current economic environment now and how uncertain things are, there's still some more random pockets of behavior. So these events give you a chance to reset the system.

Eduardo:

And an opportunity to enjoy each other, right, and celebrate.

Rick:

If we're gonna decide to make this investment, what are some elements of a truly great event?

Eduardo:

First and foremost, right? You gotta have a north star. You gotta be really clear about the *why* behind the work that you're embarking on, and connect it to what's important to your team. Oftentimes, you would think that that would be easier, but it's not. You have so many different stakeholders that are involved in the decision-making – that in itself is difficult.

Jason:

One thing that we sort of assume happens is the celebration aspect of it. With the difficult economic environment, it still needs to exist. But that isn't one of the real big differentiators we're seeing right now. It's still very present, but it's not one of the biggest things we're seeing. Biggest drivers of these [are] turning education into a chance to really activate it for the teams. Some baby steps that I can use right off the bat are some

experiments that I can try to figure out what really works with me. There's so many people who want to get time with these commercial teams at these offsites, to share a message, to talk about initiative they're working on or a product or something going on. And, the downside of that is, a whole lot of people pullin' the agenda in different directions; the other big downside you also hit on is [that] these need to have an opportunity for people to do something with that information, so it doesn't bounce off their forehead.

Eduardo:

One of the things that you said is giving everyone the opportunity or the space, you called it white space, but it's the space to sort of reflect and sort of that reflection can be guided, but giving individuals to take it in, reflect, and think about what it means and actually create plans for what's ahead. Oftentimes, we're just cluttered with information, and by the time you're done, you just haven't had that opportunity.

Rick:

We can tack 30 minutes onto the end of the last day and tell 'em to make their application commitments, and again, be surprised when they don't do them.

Eduardo:

Yeah, doesn't work.

Jason:

That's 30 minutes of deep breathing, recovering from last night's celebration. It's just never spent the way you want it to be.

Rick:

Sounds so obvious, but it seems like people just can't do it and that is thinking about the participant experience first, every step of the way. I can't tell you how many of these planning sessions I've been in on and they're like, "Oh yeah, they only have 10 minutes to get from here to there, and the convention center says it takes 15, but they'll be fine."

Rick:

The environment and the experience that we create shows them potentially that we do care about them as people. Not an internal conference, but one time I put on a marketing event. A client pulled me aside after and his words were, I don't know how you guys did it, but I strangely learned more at this thing than I have ever before, and I also feel like I've been on vacation. That happened because we were so intentionally focused on keeping the content very, very crisp, very, very focused, but **equally focused on the wellbeing of our participants.**

Jason:

You know, Rick, you hit on something that drives me crazy at some of these events, the passing periods and how short they are – to go 10 minutes in what

should take you 15, is an example. I think we forget how that casual conversation of standing up, leaving one room, walking down the hall and going to another one and then doing that walk next to two or three of my colleagues as we just chat about what we just experienced. That's where I get to personalize it. That's where I get to internalize it. That's where I get to think about how I'm going to use that. It doesn't happen when I'm just sitting and listening and trying to absorb from someone on the stage.

The other big thing that I love when it happens at events is, if there's a way to get people outside, it can get into that more relaxed feeling, so that people can take in information and not feel so pressured like so much is coming at them.

Eduardo: And I think it's important, right, to, especially when you're doing the agenda is just right and you're doing real work – it can be intense, and it's really important to break that pattern, right? People need that break.

Rick: What are some of your best recommendations, and also, what potentially do well intention folks do wrong?

Eduardo: You know, the logistics of an event are very important. Bringing the key stakeholders together and just align on: what are the outcomes that you're trying to drive from the event? That will define the rest of the experience and everything else that you do from there.

Jason: As you define that purpose, build out the agenda as tightly as you can to that purpose and have the courage to say no to putting anything on the agenda that's not aligned to it. Once you build a first pass at the agenda, **find something to take out. Make the space that you got back into white space for people to process more.** On top of doing the planning upfront, share that message out, share the intention out, so when those stakeholders pop up outta nowhere two weeks before asking for 30 minutes of time, you can say, "Hey, remember the objectives we shared before?"

Rick: The relevance of the agenda, I think, is so, so critical and having a multi-track experience. Inevitably, at these things, there are usually front line sales managers, for example, kind of hanging out in the back of the room, and people potentially are frustrated because what's the message they're sending to their teams? But at the same time, you've gotta be empathic to these folks and say the content

wasn't created for them, they're just enduring this. Or, you know, the marketing support people, or the sales engineers that are there – whoever the peripheral people are, you have to make sure that, again, if you're invited to this thing, I'm gonna provide value for you being there, and I'm going to give you things that are specifically gonna make you better at your job.

Eduardo:

I think that goes back to being intentional about what people are going to do and what they're going to hopefully get out of it and that includes everyone.

Rick:

So, let's say I am a mid-level sales leader or an enablement team member, maybe a marketing person that has passion about this being done well or right, but I don't have the [decision-making power]. What is your best advice for those out in the audience hearing this right now that are going, "Ooh yeah, that's right, but there's no way I'll be able to get my people or my organization to shift to this way of approach to a large scale event." What could they potentially go do to begin to influence the right behaviors?

Jason:

If you're early in the planning, trying to get the right leaders in the room or even if you do a piecemeal to agree on those north star objectives for the event. If you're later on in the planning and you've already got those objectives, be willing and courageous enough to just raise the question when someone says, "Hey, can we do this" – "How does that align to the outcomes we want?" Find an opportunity and fight hard for it to provide white space for people to just process.

Eduardo:

That's so important to visualize the challenges that you've had in the past. What do you wanna do that it's different and being courageous enough to raise that and provide examples or a path forward.

Rick:

All right, gentlemen, well thank you so much for coming back in. Hope you have a wonderful rest of your day.

Eduardo:

Thank you, Rick.

Jason:

Thanks Rick for the time. Appreciate it.

Masami:

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