

# Getting the Most from Your Emissary Advisor Interactions

YOU'VE SCHEDULED A CALL WITH AN EMISSARY ADVISOR... NOW WHAT?

## BEFORE

### 1. Take stock of your needs:

#### Pre-call coaching.

Ask your sales manager for ideas on where to focus.

#### Assemble documentation.

Gather any account notes and plans. Clarify where you are missing information, the obstacles you face and your goals.

### 2. Send prep materials:

#### Share background.

Use your email relay address (on your Emissary Exchange engagement page) to provide your Emissary Advisor with (a) helpful account background (b) a list of who will be on the call (c) background on your company and product (demo videos, case studies, pitch decks).

#### Draft an agenda.

Let the advisor know how you would like to spend your time, questions you plan to ask and your meeting goals.

## DURING YOUR CALL

### 3. Make introductions:

#### Keep it short.

Explain your situation, what you want to accomplish. Ask about the advisor's previous role and responsibilities. Review prep material highlights and answer any questions.

### 4. Facilitate the dialogue:

#### Use your sales call skills.

Drive the meeting. Structure a logical agenda. Take the opportunity to practice discovery with an executive buyer in your market.

#### Keep focused.

Maximize your time by avoiding side conversations and guiding the advisor to the insights you need.

#### Ask for appropriate insights.

Keep in mind, your Emissary advisor can't divulge confidential information or endorse products.

### 5. Conclude with clear actions:

#### Confirm next steps.

End the call with a summary of next steps. Capture any follow up actions for both you and the advisor, if any.

## AFTER

### 6. Fill out a feedback form:

#### Rate your interaction.

Post-call, you'll receive a short [feedback form](#). Take five minutes to let your organization know how it went. This helps your team measure and maximize benefits.

### 7. Adjust your plan:

#### Review transcripts and notes.

Use these documents to ensure you've captured all insights. (If your organization uses notes, they are accessible via the [Deliverable Archive](#).)

#### Manager coaching.

Follow up with your manager and work together to action your newfound insights.

### 8. Follow up with Advisor(s):

#### Email follow up.

You have 30 days of email access to the advisor via your email relay. Share progress updates. Ask follow-up questions. Get further coaching.

#### Renew and re-engage.

You may work with your program owner to secure new meetings to support your sales cycle.

# Question Starters

## GETTING IN

### Determine potential product fit:

- What major strategies are driving tech purchasing and consumption?
- Where is the white space / unresolved problems for my product?
- Does the account have a solution like mine in place? How is it viewed?
- How does my product fit in the tech stack? How strong are vendor relationships? When do they renew?

### Clarify organization structure:

- How is the organization structured? How autonomous are the business units? Politics?
- Who drives purchasing, business or central IT? Shared services?
- What can be bought at the business unit level versus requiring corporate involvement?
- Are there regions, or teams with more sway? Have more funding?

### Identify contacts with possible needs, budget:

- Who would make decisions on my product type? How do they fit into the organization?
- What influence do they carry? Role in decision-making process?
- Who do they report to? Who do they delegate to?
- How would you describe their personality? Decision-making style?
- What is the most direct route to get their attention?

### Generate ideas for impactful messaging:

- What messaging resonates? Hot buttons that will create a strong reaction? What will turn off decision-makers?
- How does the account view itself in the market? Who do they compare themselves to?
- What data, case studies, content would stand out?
- What buying or budget cycles could impact purchase timing (and my approach)?

### Develop strategies for gaining access:

- Approach. How do I approach the organization to be noticed? Would you recommend a bottoms-up or a top-down approach?
- Entree: Are there vendors, partners, or consultants I should align with?
- Channels. Where can I be seen? Associations, groups, conferences? Social? Email?
- Timing. Times to try. Times to avoid?

# Question Starters

## ACCELERATING A DEAL IN FLIGHT

### Identify buying group members:

- Who is likely in the buying group for this deal? How urgent is this to each?
- What role will each play? Who has ultimate sign-off?  
How are end-users included in the process?
- How do they like to receive information? What are their organizational and individual goals?
- What role will procurement play? When should I engage them?
- How are end-user perspectives included?

### Clarify buying process:

- Are there spending limits associated with roles and levels?
- What role will vendor management and procurement play?
- What steps are included in the process and how long will it take?
- Does the process start in the business, IT, or both?
- Which areas may be easier to fund off-cycle?
- Will a POC be required? And if so, how will it be evaluated?

### Generate positioning strategies:

- What pain points matter the most?
- What are the tech biases? (E.g., for/against cloud, open source, point solutions...)
- Who are my likely competitors?
- What should go in a business case?
- Does my solution complement or replace existing vendors' in-house capabilities?
- What kinds of presentations and proposals are successful?  
What have you seen work? and fail?

### Strategize next steps in opportunity:

- Scope. Goals for next meeting? With whom (on both sides)?  
How do I show value immediately?
- Demo. Who attends? What should we demo? What data would we use?
- Propose. Advice for configuring the solution. How to pitch for maximum impact?
- Pilot. What should I build into a pilot? How will it be evaluated?
- Negotiate. Who negotiates and what terms are expected?

### Identify risk and options to resolve it:

- Are there reasons which would drive the business, IT, or procurement to stall a deal?
- What stage of the buying process presents the most challenges?
- Which decision-makers will be most resistant to my plan?
- What perceived weaknesses in my proposal should I be prepared to defend?
- How do I handle [objection raised in sales process]?

# Question Starters

## EXPANDING AN EXISTING ACCOUNT

### Identify new white space areas:

- How is the org structured and how does our current work fit in?
- What unresolved problems exist across the organization that fit with our broader capabilities? Both within, and outside of, our current relationship?
- Based on the presence we have today, where is the next logical business unit for us to work?

### Determine how to navigate the organization:

- How might we get more executive-level conversations?
- How do we get referred from one business unit to the next?
- Are there any political issues we should be aware of?
- Which well-established vendors, partners or consultants should I work more closely with?

### Identify contacts to expand reach:

- How can we expand the connections between our organization?  
E.g., connect our execs to theirs?
- Outside of our current contacts, who else has decision-making influence?  
What is their role, reporting relationship?
- How do we get referred into them from where we are today?

### Determine how to position value to account:

- How do we show the value of our existing solution to the organization?  
What ROI metrics are favored?
- How do we change our positioning from limited provider to broad strategic play?
- What investments can we make in the relationship that will generate impact?

### Generate growth, retention strategies:

- Renew. What is the strategy for negotiating renewals? What gets in the way of renewals?
- Recovery. How do we recover from a service failure? Have you seen this done successfully?
- Upsell / cross-sell. When during the contract should we propose new solutions?  
Who should attend a QBR? A report to management?