



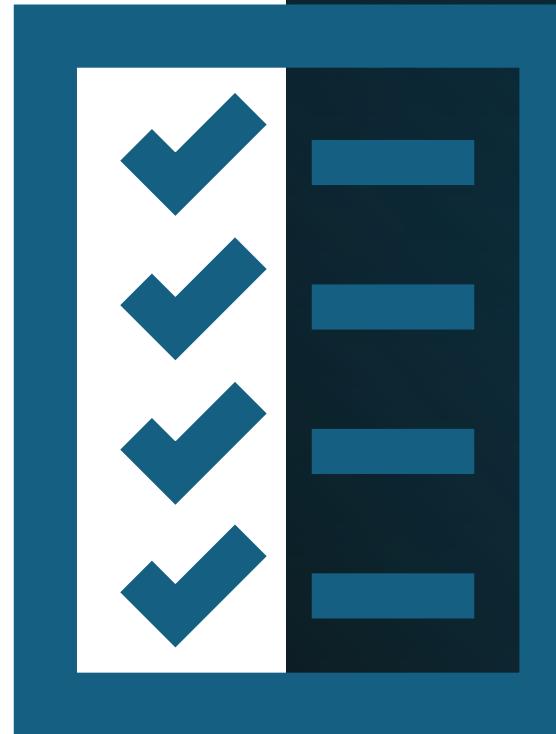
# The Middle Six

## Final Client Presentation

Team Members: Ashley Puccini,  
Ben Brussat, Olivia Uz, Juliana  
Ruiz-Rodriguez, Nathan Boockvar

# Agenda

- Who is Middle Six?
- Insights
- Implementation Plan
- Evaluation
- Discoveries
- Survey
- Results
- Recommendations
- What's Next?
- Summary
- Q&A



# Our Client

- Lisa is extremely hands-on throughout the consulting process
- Offers a comprehensive range of tailored sales services for businesses ranging from startups to established companies
- Dream client: D2C business moving into B2B
- Fractional team of 9



Mission Statement: We create sales roadmaps that **empower, educate, and engage** entire teams.

# End Goal

**Develop an actionable roadmap to digitize The Middle Six's Sales Bootcamp course.**



- Integrate Lisa's **personal touch** and interactivity
- Understand key learning moments in the course
- Protect The Middle Six's proprietary course materials and client information

# Insights



High degree of personal involvement in the sales process leaves little room for growth/scale



Demonstrated interest from broad audience



Lisa's expertise inaccessible due to time/cost constraints



Personalization is core to The Middle Six's approach

# Middle Six Needs Statement

Our client, The Middle Six, needs a way to optimize operations and increase sales by leveraging strengths such as **strong demand for its expertise** and a **strong network of existing clients**.

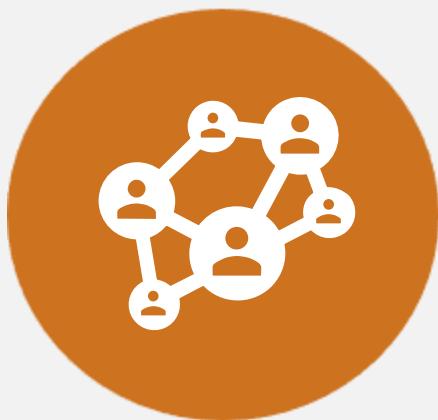


# Our Plan

Gain	Gain insights on the middle six as a company
Research	Research virtual sales bootcamps
Create	Create a roadmap for a sales bootcamp that combines our qualitative and quantitative research

# The Plan

Incorporating Lisa's personal touch will enhance the learning experience in the digitized Sales bootcamp through hands-on learning activities in the segmented course objectives.



Interpersonal relationship building & networking opportunities built in the modules available through **Live zoom sessions, scheduled one-on-one/group sessions with Lisa**



A well-balanced amount of team-work in the form of group projects so Lisa is available to meet with several teams and continue to build upon their skillsets, while building **trust** with her students



Interactive elements in each module/lesson to keep users engaged with the educational content & apply what they have learned so far (**fill-in the blanks, polls, scenarios, check-ins**)

# How are we going to protect the information?

We aim to secure the Intellectual Property of the Middle Six's digitized bootcamp "Closing The Deal" through a combination of activated third-party privacy management software into HubSpot for maximum data protection.

- Middle Six prefers a native connection with Hubspot, allowing:
  - Users to have their own sign-in account to store their progress - no need to take out the materials from The Middle Six website.

- LMS with full suite of privacy/material protection functionality such as Canvas (tracks page leaves, prevents copying, etc.)
- Utilize DocuSign to distribute digital NDAs with privacy clause highlighted

- Manage and protect digital boot camp materials
- Only authorized users (enrollees) may access bootcamp materials
- Activate third-party software into HubSpot for additional content/data protection

# Implementation Report

## Actions

Available team members must attend a 2 hour, consolidated Closing the Deal Sales Bootcamp session with Lisa Proeber

Find a way to protect the information that is being presented in the bootcamp

Create a strategy to personalize the bootcamp

Find a place for this new product in the market

## Impact

Gain better idea of what the boot camp is actually like, first hand.

Protects Lisa and team from sharing/recording the bootcamp

Ensure that the digitized bootcamp has the same effect as the in person version

Help create a fair market value, that will lead into creating steps for marketing

## Time Restraints

3/11/2024 at 9 am

Needs to be done before launch

Needs to be done before launch

Needs to be done before launch

# What We Did

We attended a sales bootcamp with Lisa

We researched virtual bootcamps, ways to market them, and how to protect virtual content on the internet

We brainstormed ways that Lisa could keep her personal touch through the virtual model

We recorded and analyzed quantitative data through surveys of past participants

# Obstacles and adjustments



An adjustment that we had to make throughout our process that was not in the original plan was figuring out a way to back up our findings with quantitative research



We decided that creating a survey and gathering feedback from past participants could be a good way to gain insight into how customers view the bootcamp



We used these findings to help us create recommendations for the virtual sales bootcamp that is tailored through the lens of the customers

# Evaluation Report

What we want to measure:	Target Outcomes:	Comparison Benchmark:	Methods of data collection:
How customers portray the boot camp, potential passive income of boot camp, rate of in-person boot camps	Passive income, expand target demographic, Lisa's personal touch is shown	Rate of in-Person Sales Bootcamps, Survey feedback from past participants	Feedback from the survey of past participants, for a baseline that is compared to, when the virtual sales boot camp is implemented, we can use an end-of-course survey and record course completion rate and course registration data.

# Research on Sales Boot Camps

## How to make them successful...

### Clear objectives and Curriculum

- Due to the potential for confusion with online content, the learning objections should be concise and clear

### Engaging Content Delivery

- Utilize a variety of media such as videos, presentations, and interactive activities to promote engagement and add an in-person feel
- Incorporate real-world examples and success stories to make learning more relatable

### Collaborative Learning Environment

- Use virtual breakout rooms for group activities, peer feedback, and collaborative problem-solving

### Evaluation and Feedback

- Implement a Post-bootcamp Survey to gauge retention and find potential problem areas

# Our discoveries

## Best ways to market the virtual boot camp



### Google Ads

**Opportunities:** Google Ads can reach a wide demographic due to its dominance in search engine usage.

Target ads based on keywords, demographics, interests, and browsing behavior and use these on customers searching keywords related to your product

**Contact method:** Engage with potential customers through display ads, search ads, video ads, and shopping ads



LinkedIn Ads

### LinkedIn Ads

**Opportunities:** LinkedIn Ads offer a unique opportunity to target professionals and decision-makers directly within their work environment.

**Contact method:** Tailor your messaging to resonate with professionals seeking to enhance their skills or advance their careers. Additionally, leverage LinkedIn's precise targeting options based on job titles, industries, company size, and professional interests to ensure your ads are seen by the right audience.

# Benchmark Survey

# Survey Design

## Content Relevance

- What pieces of the course stuck with participants the most?

## Content Delivery

- What made the delivery format exceptional for the participants?

## Course Satisfaction

- Were the participant's needs and expectations exceeded?

Please rate the relevance of the bootcamp's segments. \*

	1 (Very Irrelevant)	2	3	4	5 (Very Relevant)	N/A
Sales Science	<input type="checkbox"/>					
Sales Psychology	<input type="checkbox"/>					
The Art of Sales	<input type="checkbox"/>					
In-Person Selling	<input type="checkbox"/>					
Digital Sales	<input type="checkbox"/>					

Which tool in the workshop did you find most helpful?

- Predictive Index
- Behavioral Assessment/Reference Profiles
- Sales Periodic Table
- Other: \_\_\_\_\_

Which session format did you find most effective for your learning?

- Lecture/Presentation
- Group Discussion
- Hands-On Activity
- Other: \_\_\_\_\_

How helpful did you find the breaks at 45 minute intervals in facilitating your learning?



How important was group interaction in your learning process?



How would you rate the length of the bootcamp?



What technique or concept from the boot camp have you found most valuable in your day-to-day work?

Your answer \_\_\_\_\_

Overall, how satisfied were you with this bootcamp?



Overall, how satisfied were you with this bootcamp?



How likely are you to recommend this bootcamp to others?



How likely are you to attend another bootcamp with The Middle Six in the future?



Please use this space for any general feedback or comments you have about the boot camp. Thank you!

Your answer

# What were we looking to gain?

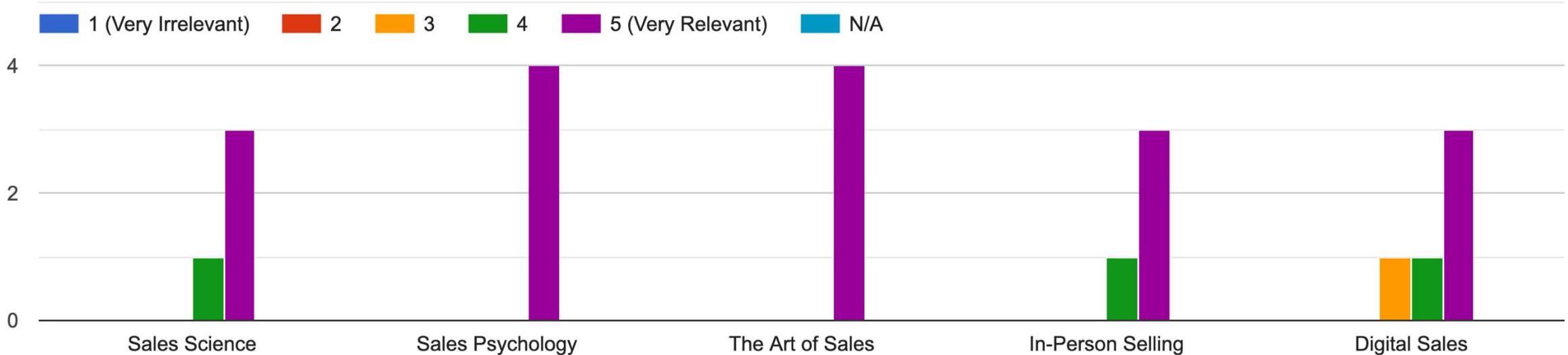
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- Understanding which aspects of the boot camp are most valued by participants, allows them to focus on and improve those areas.
- Identifying any shortcomings in content, delivery, or format, allows for necessary adjustments for future iterations.
- Gauging participant satisfaction and likelihood to recommend the boot camp, can serve as indicators of overall success and potential for growth.
- Gathering actionable feedback for continuous improvement, ensuring the boot camp remains relevant and effective in meeting participants' needs and expectations.

# Survey Results



# Survey Results - Content Relevance



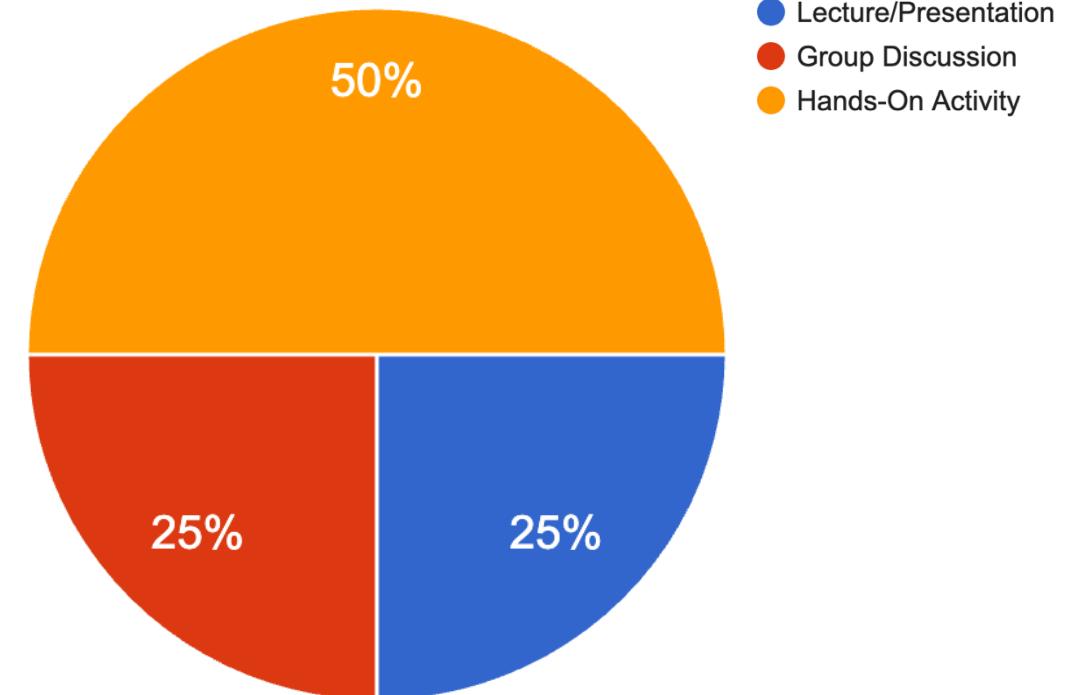
Participants found the Sales Psychology and Art of Sales segments to be the most relevant.

# Survey Results - Content Delivery

Interactive Formats:  
Highest Impact

Group Activities =  
Integral to Experience

Breaks Are A Win,  
Course May Run Long



# Survey Results - Course Satisfaction

Across the board, **course satisfaction was high**. Participants unanimously indicated they would recommend the course to peers.

Participants specifically found networking with other attendees to be a highlight.

*“Don't forget to ASK FOR THE SALE!!!!”*

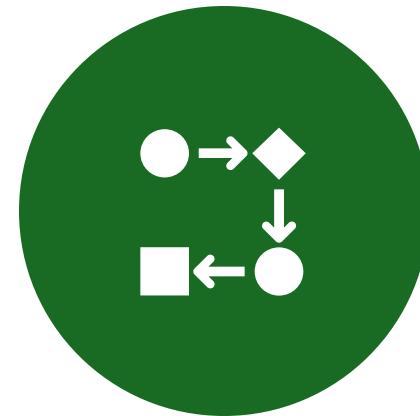
*“Using social proof to connect with clients”*

How has the course added value to your day-to-day work?

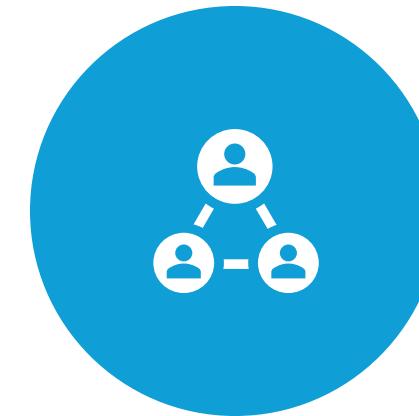
# Recommendations



**DELIVER**



**PERSONALIZE**



**CONNECT**

# DELIVER

Interactive Activities

Hands-On Exercises and Material-Based Problems

Give Them Breaks!

# PERSONALIZE

Natural and Asynchronous Segments

Context via Lisa's Personal Anecdotes

Customized Participant Experience with Course Tools

# CONNECT

MONTHLY/QUARTERLY  
CONNECTION HOUR



IN-PLATFORM GROUP  
DISCUSSION BOARDS



LINKEDIN ALUMNI  
GROUP



FOLLOW UP SURVEY

# Post Virtual Boot Camp Evaluation Survey



Which aspect of the boot camp did you find most valuable?

- Content
- Format/Delivery
- Group Interactions
- Other: \_\_\_\_\_

How would you rate the amount of group interaction?



How likely are you to recommend this boot camp to others?



What was your main takeaway from participating in the boot camp?

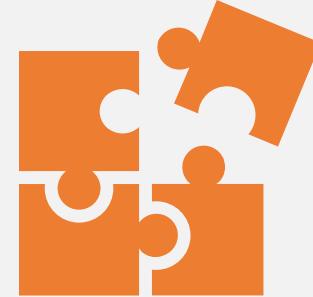
Your answer  
\_\_\_\_\_

# Our Middle Six Journey

**Our goal is to build scale and efficiency for  
The Middle Six while preserving Lisa's  
signature *personal touch*.**

- Increasing passive profitability is a priority
- Digitizing existing materials will **help expand audience reach and drive incremental sales**
- Online format means reduced personal time investment for Lisa
- Lower cost to consumer makes Boot Camp more accessible than ever

# Our Middle Six Journey



Our team started off by researching about The Middle Six, presenting an Executive Committee Presentation, and getting approval from Lisa and her team

Utilized primary and secondary resources & implemented our experiences + insights with Lisa's Sales bootcamp to develop a questionnaire

Analyzed the questionnaire results to learn about The Middle Six's clients' satisfaction with the content and structure of the bootcamp.

Putting all the pieces together by concluding with informed interpretations and recommendations that will be crucial for the design and success of digitizing Closing The Deal Sales Bootcamp

# Why This Will Work



- Seamless integration of existing content
- Accessible, user-friendly, and self-paced



- Tailored training modules and workbook
- Demonstrated high demand
- Reach new audiences
- Lisa's expertise in an online format



- Cost-Efficient
- Flexible Delivery
- Semi-Passive Income



- Extensive platform research to engineer optimal digital learning experience
- User Research, Personas and Testing for feedback on the digital version



# What to do with this moving forward

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With our team's informed research, insights, and recommendations, The Middle Six can confidently launch a digitized version of their current (INP) Sales Bootcamp with:

- A clear understanding of the **do's and don'ts** to design a fundamental sales bootcamp for clients to experience meaningful + effective **educational outcomes in their careers/businesses**

# What does that look like?

Ensuring that the Digital Sales Bootcamp is built entirely around their clients' or users' **needs** to continuously develop and **improve their online learning experience.**

## Proactive Solutions



Prioritize understanding and applying Boot Camp personalization to digital course



Utilize LMS-provided onboarding resources, build extra margins into timeline to account for learning



Systemize feedback collection and application for optimal consistency



Thoroughly research competitors and gain understanding of market whitespaces

# Why is that important to the Middle Six?



**Investing time** in digitizing their product will help grow their business, **maximize ROI** through well-designed products



The digital Sales Boot Camp will build **incremental revenue** for The Middle Six and make Lisa's expertise **accessible** to new audiences.



Receiving positive feedback matters. **Listening** to clients' needs and crafting a product that enhances their learning in a digital environment, but consistently **preserving Lisa's personal touch.**

# What impact this will have on Middle Six



EXPAND THE MIDDLE  
SIX'S TARGET  
DEMOGRAPHIC



GIVE LISA A FORM OF  
PASSIVE INCOME



ELEVATE THE  
COMPANY WITH THE  
ADDITION OF A NEW  
PRODUCT



CREATE A BIGGER  
NETWORK OF SALES  
PROFESSIONALS AND  
EXPERTS FOR THE  
COMPANY

# Overall Summary



## Insights:

Gained knowledge on virtual bootcamps, marketing them, copyrights on virtual products, and Lisas previous in person sales bootcamp



## Plan:

Gather knowledge on how to launch a virtual bootcamp that would be perfect for Lisa and The Middle Six



## Challenges:

How to keep in person touch



## Impact:

Customer expansion, stream of passive income



## Next Steps:

Create virtual sales bootcamp with recommendations we listed and use our post bootcamp online survey to track the progress of the bootcamp



Questions?