



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

A large orange circle is positioned on the left side of the slide, partially cut off by the edge.

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**.

A blue dashed line is located in the bottom right corner of the slide, consisting of several short, curved segments.

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

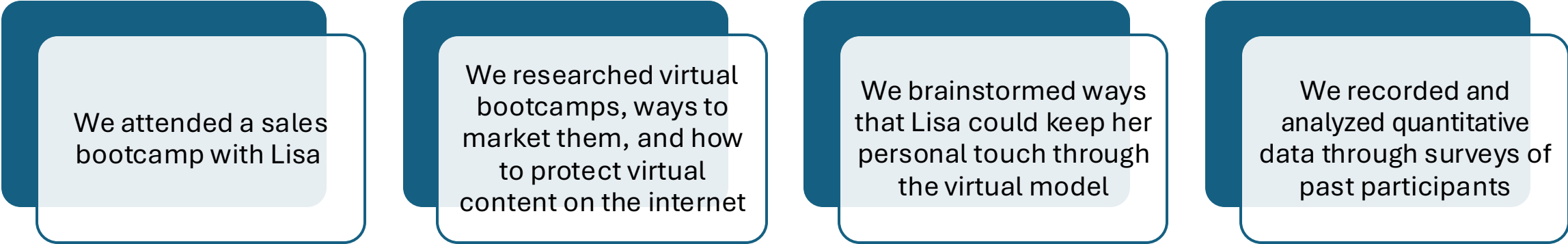
3/11/2024 at 9 am

Needs to be done before launch

Needs to be done before launch

Needs to be done before launch

What We Did

A horizontal sequence of four steps, each represented by a dark blue rounded rectangle with a light blue rounded rectangle inside it. The text is centered within the light blue rectangles.

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 created 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.

A close-up, slightly blurred photograph of a spiral-bound notebook. The notebook is open, showing several pages with horizontal ruling. A black spiral binding is visible on the left side. A silver-colored pen with a textured grip lies diagonally across the pages. The text "Benchmark Survey" is overlaid in a large, white, sans-serif font in the center of the image. The background shows faint numbers like 15, 16, 17, 18, 19, 20 and the number 30 repeated on the lines, suggesting a form or survey template.

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?

Overall, how satisfied were you with this bootcamp?

	1	2	3	4	5	
Very Unsatisfied	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Very Satisfied

How likely are you to recommend this bootcamp to others?

	1	2	3	4	5	
Very Unlikely	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Very Likely

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

	1	2	3	4	5	
Very Unlikely	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Very Likely

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

Your answer

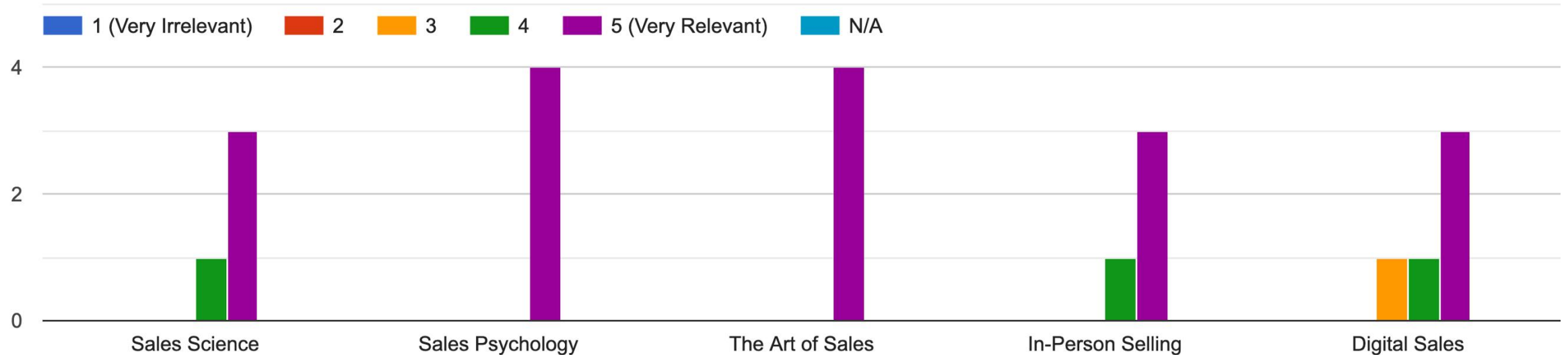
What were we looking to gain?

- 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



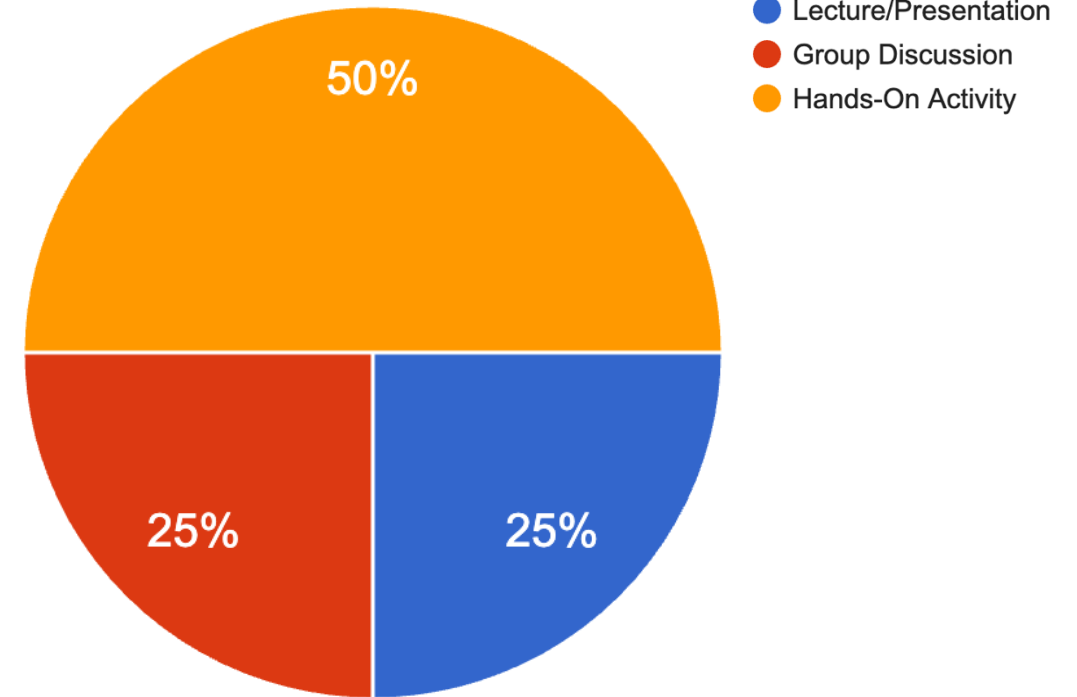
Participants found the Sales Psychology and Art of Sales segments to be the most relevant.

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!!!!”*

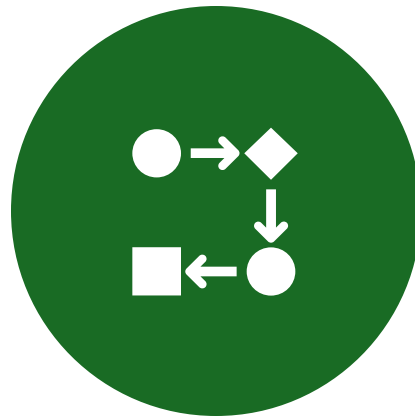
*“Using social
proof to connect
with clients”*

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

Recommendations



DELIVER

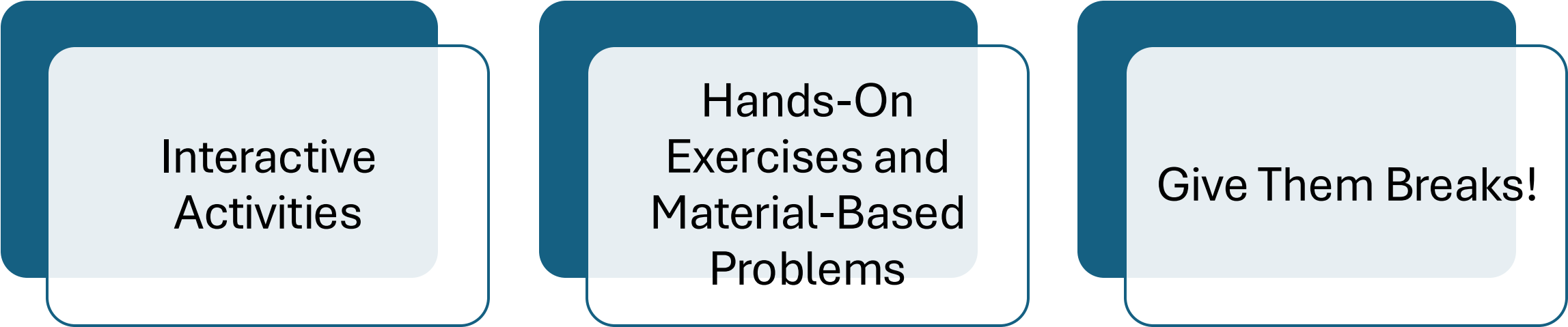


PERSONALIZE



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



Middle Six Post Virtual Boot Camp Survey

Thank you for attending the Middle Six's Bootcamp! Your feedback is invaluable to us as we strive to improve our programs and better meet the needs of our participants. Please take a few minutes to complete this survey to share your thoughts on your virtual boot camp experience

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?

	1	2	3	4	5	
Not Enough	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Too Much

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

	1	2	3	4	5	
Not Likely	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Very Likely

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



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



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



- 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

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?