

# Client Name

## Vested 360 Workshop





# Agenda

12:00 - 12:10 pm: **Group gathers**

12:10 - 12:25 pm: **Introductions**

- Goals and rules for the day

12:25 - 12:55 pm: **Objective Setting: Sales & Marketing Goals**

- What are the top 2-3 sales and marketing goals in the next year?

12:55 - 1:40 pm: **Audience Mapping: Identify Target Market**

- Who are we selling to?

1:40 - 1:50 pm **Constituents**

1:50 - 2:50 pm: **Issues**

- What are the main obstacles to achieving your sales and marketing goals?

2:50 - 3:50 pm: **Perception Analysis: Current vs. Desired Perception**

- How are you currently perceived by your key audiences? And how do you want to be perceived?

3:50 - 4:15 pm: **Ideas**

4:15 - 4:45 pm: **Key Differentiators**

- What makes you different from competitors?  
And can you prove it?

4:45 - 5:00 pm: **Wrap Up and Next Steps**





# Issues for the Day

STRICT TIME-KEEPING

NO CROSS-TALK

DEVICE USAGE TO A MINIMUM

STAY ENERGIZED (CAFFEINATED)

NO COPYWRITING BY COMMITTEE

IDEATE



# Sales & Marketing Goals

What are your top 2-3 sales and marketing goals in the next 12 months?



# Audience Mapping



REGIONS



INSTITUTIONS



INDIVIDUALS



# Overcoming Sales Obstacles

	Clients	Prospects	Media	XYZ			
ISSUES							
IDEAS							



# Overcoming Sales Obstacles

	Clients	Prospects	Media	XYZ			
Current Perception							
Desired Perception							



# Key Differentiators

WHAT MAKES YOU DIFFERENT?	PROVE IT





# Next Steps

- . Vested360 Messaging
  - . Distillation of discussion and discovery
  - . Development of messaging
  - . Plan and communications recommendations
- . Any additional ideas? E-mail us!





QUESTIONS?  
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