Whiteboarding Your Win Themes

Tobin Spratte, CP APMP
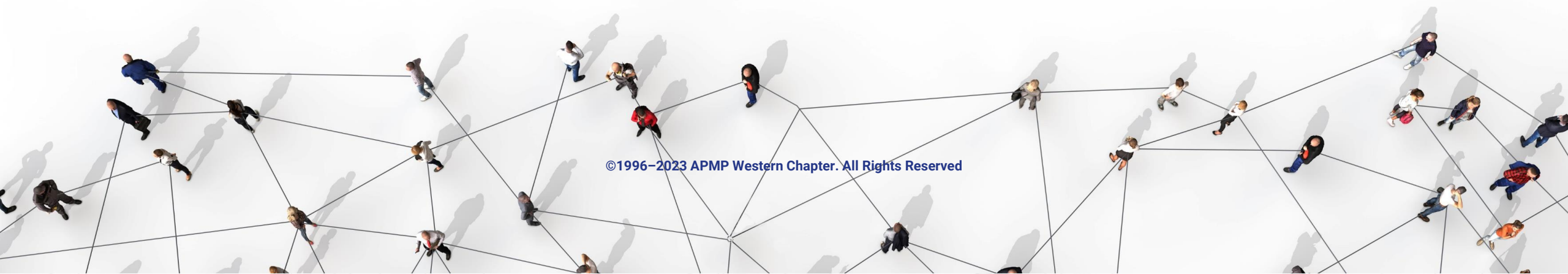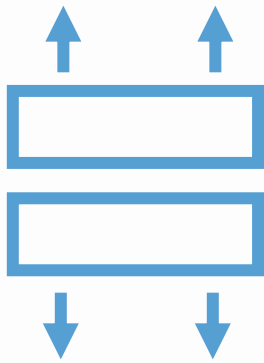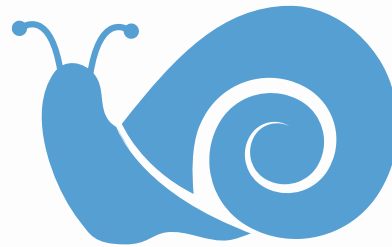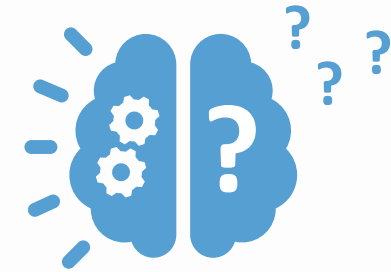
About me
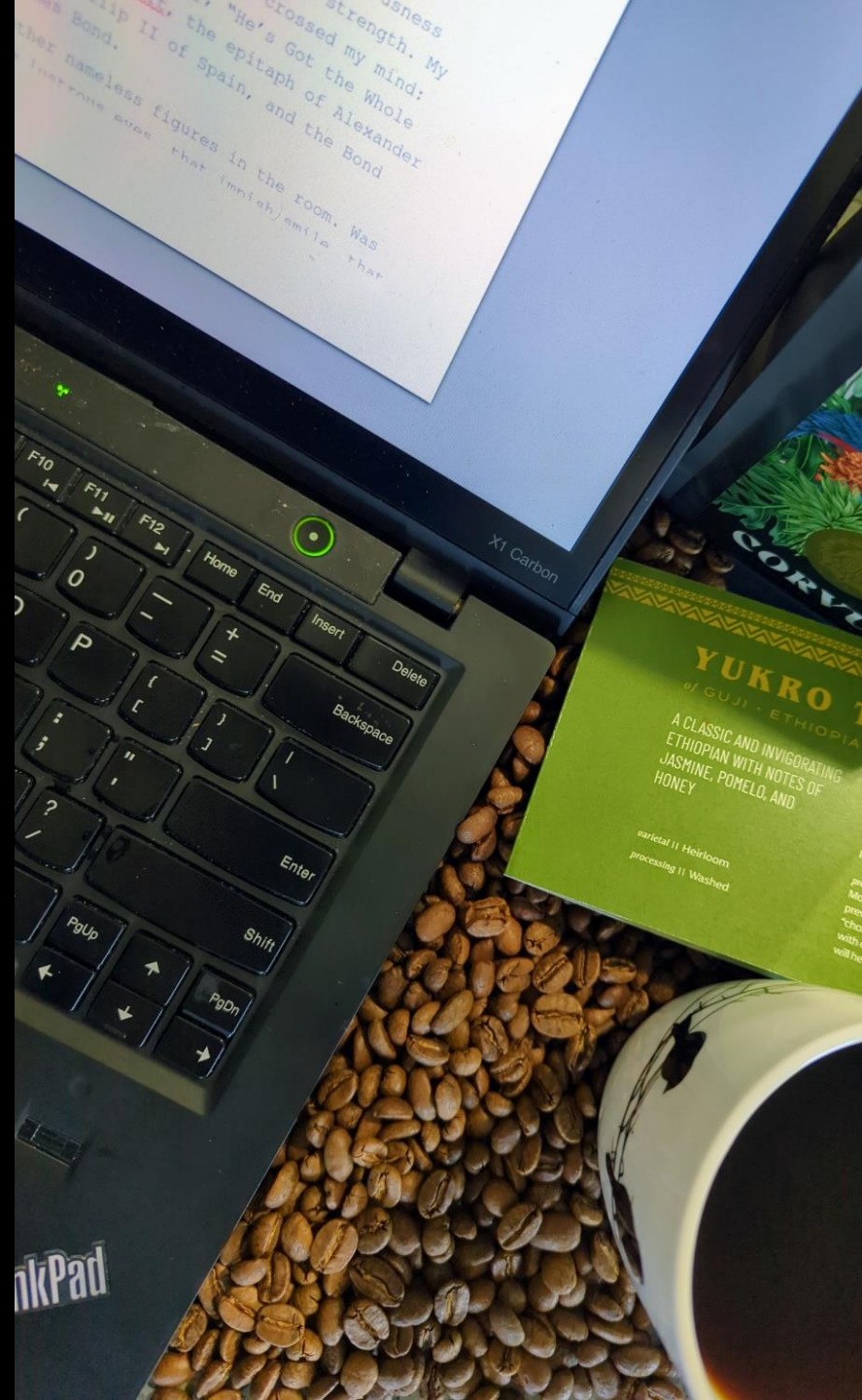
Common Issues

Proposal lacks cohesive, coherent win themes

Obtaining information from emails and isolated conversations is slow

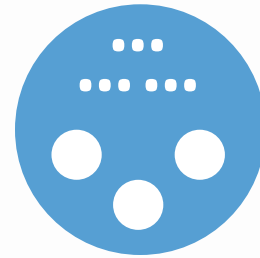Unguided input is irrelevant, inaccurate, or contradictory

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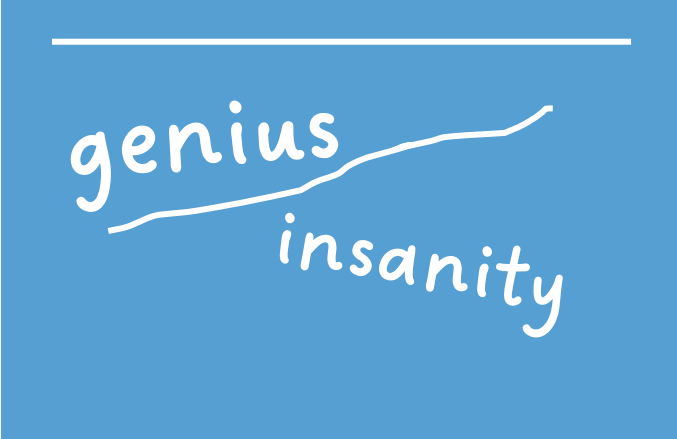
Common Issues

Roundtable discussions dominated by a few outspoken team members

Clients sent generic qualifications developed from boilerplate

In-person war rooms costly and not pandemic proof

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Exercise useful for

genius insanity

- Quickly garnering ideas from myriad voices

- Brainstorming win themes in real time

- Ensuring win strategy resolves client concerns

- Aligning technical approach with qualifications

- Identifying discriminators and proof points

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Preparing for the Strategy Session
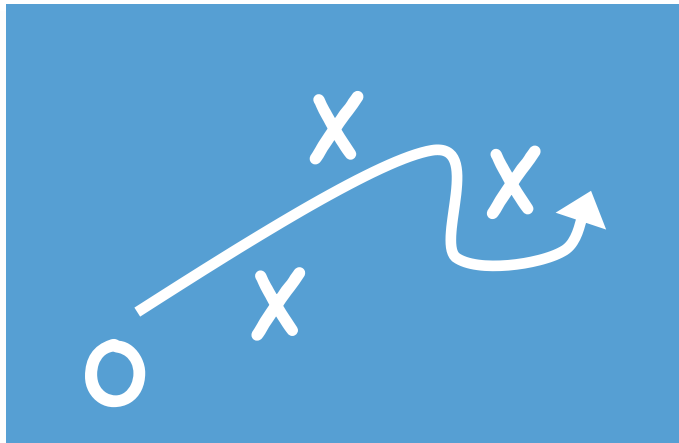
- Schedule session when you are ready, not when convenient

- Session leader must come thoroughly prepared

- Include someone directly connected with client

- Participants understand key technical issues in advance

- Participants have access to virtual whiteboarding software

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Software for whiteboarding

Templates

✦ Recommended

▢ My templates

👥 Shared with me

💡 Brainstorming

❖ Problem solving

🔍 Design and research

📈 Strategy

▦ Project planning

☁ Retrospective

🏆 Games

🔧 Workshops

🧠 Learning

☑ Show for new whiteboards

Recommended

Start with blank canvas
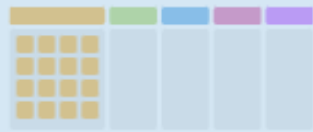
Affinity diagram
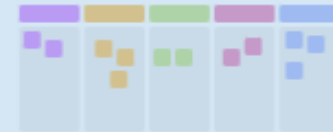
Topic Brainstorm

Where in the world
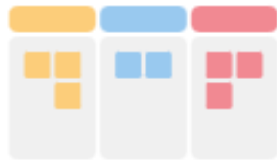
Daily stand-up

Moodboard

Cause and effect diagram

Jobs to be done

Quick retrospective

Cost/benefit analysis

Padlets are visual boards for organizing and sharing content

1 Every padlet begins as a **blank slate.**

2 You **add** text, image, video and more.

3 Then **share** the padlet with others who do the same.

4 **Collaborate** to create something beautiful.

Interactive Improvisation

Whiteboard Time

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Lessons learned

Sometimes helpful to populate board with background information about client or hot buttons

Great tool for capturing ideas, but what do you do with them—how do you translate the ideas and data into win themes or action items?

All opinions are valued, but not all information is accurate, not all ideas are good

LESSONS LEARNED

Win themes can become stale when clients delay RFPs

Not all participants adept with technology or willing to try new tools

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