



“Over the course of a day I can be in four different time zones without jet lag, it’s fantastic.”
– Senior Business Development Specialist, Financial Services Firm

“This is the only way to get together and present, and control what attendees are viewing. It’s not effective to just email PowerPoints. We get much more success this way.”
– Director of Technology Services, Financial Services Firm

“Web conferencing allows us to provide value to our members, our customers, which we were unable to provide previously. We were unable to share information and conduct training sessions cost-effectively face to face.”
– Marketing Specialist, Financial Services Firm

We couldn’t survive without web conferencing.
– VP of Technology, Financial Services Firm



Going Online to Put the ‘Consultative’ Back into Consulting: *Extending Reach, Enhancing Relationships, and Building Sales*

Consultants and other professional services firms offer a unique product: themselves. This means they are constantly faced with a dilemma: how does one maximize productivity, and be billable with products and services while simultaneously marketing and selling their services? One way is to turn to web conferencing to extend reach, create new products, enhance relationships, and build sales pipelines. But do the benefits go deeper? What are the best approaches to using web conferencing in a consultative environment? Are there particular tricks of the trade that can be replicated?

To find out exactly how web conferencing can work in practice for business consultants, how one best implements, and what to expect for results, Wainhouse Research conducted a number of in-depth interviews with companies that use web conferencing every day. The findings provide direction to any business seeking to improve its business through best practices.

	Traditional Consulting	Online Consulting
Prospect	Networking Event	Web Seminar
Qualify / Establish relationship	Phone Conversation	Web Presentation
Interact / collaborate	Customer Visit	Two-Way Web Collaboration
Provide deliverable	Customer Visit or Phone / Complete Report / Deliverable	Personalized Online Report / Deliverable
Train and support	Customer Visit	Remote Training & Support
Follow-Up	E-mail or Phone Contact	E-mail / Phone / Archived Material Review /Web Session Review

Traditional vs. Online Consulting

Similar Process, Very Different Tactics

Consultants rely on interplay to bring value to their clients, and it's no surprise that web conferencing would become an attractive tool for online consulting. Consultants so often need to be in more than one place at a time, sometimes at a moment's notice, and web conferencing takes their greatest assets and distributes those assets across time and space. Traditional business consulting requires brainpower and often frequent presence at a client's location, and requires both sales & marketing and knowledge transfer efforts. Online consulting calls for these but changes the mix. The traditional approach requires a large investment of time with every client and is not very scaleable. Even business consultants with discrete products (e.g., books, software, financial instruments) lament that there are only so many hours in the day. And traditional consulting accentuates

that scarcity of time because of the significant loss of productivity based on travel time, and the downtime that occurs when one engagement concludes before another begins. The result: high costs, lost productivity, and the need to always be "selling" even while delivering consulting services.

Online consulting takes a different approach by enabling the multi-tasker extraordinaire. It lets a business be wherever it needs to be. It allows just-in-time and scheduled delivery of whatever a service or product needs to be effectively sold, delivered, learned, and understood. Some of the benefits of online consulting are obvious; the top three are increased productivity and geographic reach with lower costs. Other benefits uncovered in our interviews are more subtle. One mentioned the accomplishment of work that otherwise could not be performed, while another reinforced that web-based sessions were less intimidating to the customer than attending in person. Some find value in a greater sophistication of message delivery. Another believes the technology enables them to better serve their customers, which raises their value, creates satisfied customers, and brings in more business. For many the benefits are so profound that the technology now plays a critical role in their sales and delivery of services.

"For any consulting engagement that is remote, NY or China, one of the first things we will do is use GoToMeeting for the kickoff. Then we schedule training sessions, all using GoToMeeting. It is the ONLY way we touch the customer."

– VP of Technology, Consulting Firm

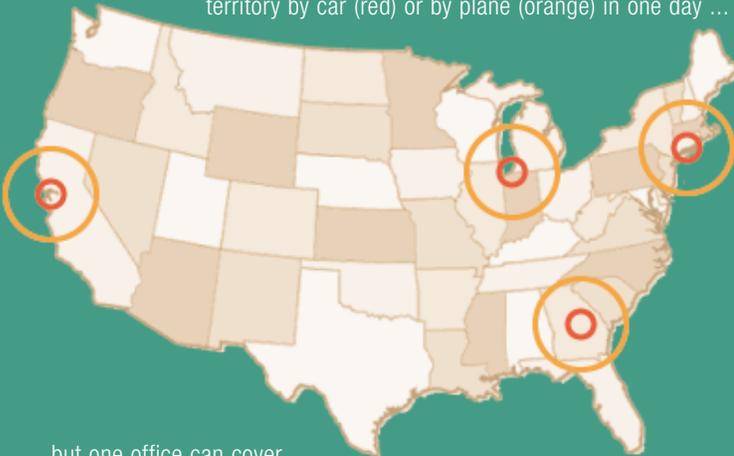
"Web conferencing allows us to visually present complex topics in a simple way. It allows us to make sure messages are delivered consistently."

– Sr. Business Development Specialist, Financial Services Firm

"Web conferencing opens up a whole new world to me. It takes me 45 minutes to do a demo and I have a 100% closure rate."

– President, Consulting Firm

Knowledge worker offices can cover only so much territory by car (red) or by plane (orange) in one day ...



... but one office can cover the entire country using web conferencing.

"Web conferencing increases the number of prospects we reach. They are more inclined to "get on" something in their office; it seems low pressure to them."

– VP of Technology, Consulting Firm

"Now I have more control over a situation, and we can store my sessions."

– Director of Technology Services, Financial Services Firm

Making the Transition

Tips from Those Who Have

When it comes to making the transition, our interviews revealed that there were two different strands of behavior as represented by two types of organizations. One group, which we call “Planners,” takes pre-determined steps, both large and small, such as holding demonstrations and training to ensure success. The other group, the “Divers,” fearlessly dive into applying the technology, quickly integrating it into the workflow by using it aggressively (and typically needing to get burned once before understanding the importance of practice). We believe neither approach is right for all situations, but instead that one will be preferred depending on the company’s existing technical skills and culture.

Most companies start small by obtaining a few licenses with the goal of gaining an understanding of how web conferencing will fit into their processes – and whether being a “Planner” or a “Diver” works for them. Early success is then built upon.

“Salespeople all need their own licenses. Think of it as a customer visit. You can’t book a sales VP into two meetings at once. But other functional areas can share licenses. We’ve looked carefully at who needs their own licenses and who does not. It becomes a productivity issue when someone can’t use it.”
– Chief Technology Officer, Financial Services Firm

It is important to appreciate that web conferencing is a different communication medium. Know your audience: they are bringing you into their offices – thus they are in control. You may face “competition” from the phone, email, IM messages, and people dropping in. Thus it is essential to retain their attention by keeping conference sessions short, briskly paced, engaging, and to the point. Paying attention to the following details will also help: slide design (keep it simple, use graphics instead of text bullets, do not read the slides – tell the story “behind” them) and the use of pointing and annotation to emphasize key points. For larger web presentations, ask poll questions and encourage questions via text chat to engage the audience.

“A bad webinar can do more harm than good. So have good planning, practice, get timing right, and plan Q&A. It’s not technology – that part will work – it’s execution!”
– Director of Business Development, Software Development Firm

“Be conscious of a downside: Know the environment of your audience. They are in their office – they can

be distracted, visitors pop in, etc. Be aware – know what you want to say and keep it short (30-45 min max); learn the hints that indicate when they’ve become disengaged.”

– VP Operations, Software Development Firm

Mastering the technology is the easy part. Appreciate that web seminars are “showtime.” Just like a physical event, practice is critical. Script who will play what role, run through what they will present, and rehearse any presenter hand-offs.

“Internally, we’ve tried to make sure everyone presenting is comfortable with the technology. We run through a mock webinar session prior to the event, work out any logistical bugs e.g., how to show the screen properly, and make sure the presentation goes smoothly in terms of delivery.”

– Marketing Specialist, Consulting Firm

“I should have practiced once or twice, but I didn’t. Fumbling on practice time, not real-time is important.”

– President, Consulting Firm

Work with your teams to encourage them to use web conferencing as a tool, and follow up. Web conferences are part of a larger interaction process with clients - they are a means to an end. Be sure to close the loop and, in the process, gather feedback.

“It’s nice to reach out to a client and help, but I encourage our team to have a client share the keyboard and mouse, and for us to show clients how to do steps, and make the client go through the motions to learn it. Passing control back and forth is important to teach clients how to fish on their own.”
– Director of Technology Services, Consulting Firm

“After every webinar we survey our attendees; we have them rank it, then ask for comments for improvement. For those who weren’t satisfied, we try to dig in to see what we could do to improve. We also make sure it’s valuable to our members: we survey them to find out what they want help with.”

– Marketing Specialist, Consulting Firm

And don’t hesitate to use the technology to assist with the close.

“When we are about to close a customer, we have signup docs, open up a web page and show them the forms, then email the document. They get the call to action right away.”

– President, Consulting Firm

What to Look For *The Features That Make a Difference*

A Wainhouse Research survey of 1,500 small business users revealed that the most important web conferencing features were ease of use, ease of booking and starting a meeting, and screen performance and speed. These findings were reinforced by our interviews.

“The performance of real-time screen sharing is very important for online demonstrations.”
– Director of Business Development, Software Development Firm

“Often when customers call us, I right click, and within 2 seconds we're online. That feature is very nice. No need to log-in on a website.”
– VP of Technology, Financial Services Firm

The ability to pass meeting control is important for multipresenter seminars, while remote control can help with hand-holding customers through a hands-on demonstration. In addition to the listed features, “all-you-can-eat” pricing that is charged on a per seat basis gives your staff the ability to use web conferencing at any time without worrying about any cost penalties.

It's Not Just about Replacement

Web conferencing is not about simply “replacing” time with clients. It is a different tool with its own set of unique advantages. Implemented correctly, the result can aid you as a consultant — especially in decreasing process time and involving the people with the right expertise regardless of where they are located. The net result is increased customer satisfaction.

More important: We give better service to our customers – which gets the word around the industry. Satisfied customers get us more business.”
– Director of Business Development, Software Development Firm

About Wainhouse Research

Wainhouse Research, www.wainhouse.com, is an independent market research firm that focuses on critical issues in rich media communications, videoconferencing, teleconferencing, and streaming media. The company conducts multi-client and custom research studies, consults with end users on key implementation issues, publishes white papers and market statistics, and delivers public and private seminars as well as speaker presentations at industry group meetings. Wainhouse Research publishes a variety of reports that cover the all aspects of rich media conferencing, and the free newsletter, The Wainhouse Research Bulletin.

About Citrix Online

Citrix Online, a division of Citrix Systems, Inc., is a leading provider of easy-to-use, on-demand applications for Web conferencing and collaboration. Its award-winning services include GoToMeeting Corporate, a complete collaboration solution that satisfies all Web conferencing needs ranging from large Webinars to small online meetings. With GoToMeeting Corporate, organizations of any size can use GoToWebinar for do-it-yourself Web events and GoToMeeting for smaller, more interactive online meetings. GoToMeeting Corporate allows users to easily present, demonstrate and provide training online to anyone, anywhere in the world. GoToMeeting Corporate can make businesses of any size more productive by reducing travel time and costs and enhancing communication, ultimately leading to faster decision making and more efficient workers. For a free evaluation of GoToMeeting Corporate, please visit www.gotomeeting.com/s/WRReval.

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What web conferencing features are most important?

