SWAY guide 2.0™

Sales with Agile

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PREFACE

It is my pleasure to present the SWAY Guide 2.0. The new version of this Guide has been designed at the request of sales and agile professionals from many different countries who have started using the SWAY system. I have taken into account all the comments and questions that were submitted since the launch of SWAY in 2019. After all, the goal of Agile is to create a valuable product based on feedback from end users.

The purpose of this Guide is to explore complex issues, yet provide clear approaches to solving them. I would like the person who picks up and reads SWAY Guide 2.0 to say, "Now I understand what the SWAY system is and how I can use it."

It is for you to decide how to apply these simple ideas. Yet remember, it is like music. There are only 7 notes, yet there are semitones, pauses, and harmonies. With these tools, musicians can create great works as well as mediocre ones. So, it is not the number of tools that matter but the vision and talent of the creator.

The creation of the SWAY system was only possible with the support of many people. Some generously shared their knowledge and experience and others inspired my creativity. I would like to express my eternal gratitude to each and every one of them, especially to

> **Jeff Sutherland** and **Ken Schwaber** for developing Scrum, which laid the foundation of the SWAY system.
>
> **Mike Beedle** for believing in me and being my mentor. Even though you are no longer with us, you are still in my heart.
>
> **Evan Leybourn** for encouragement, faith, and assistance in designing SWAY. You have become a close friend over these years. Thank you for being there.
>
> **My family** – **my son Denis and my parents** – for your patience with my never-ending business trips.
>
> Finally, **all those** who supported me and all those who believed in me; each of you is very dear to me.

To you, the reader, I wish you the best on your SWAY journey. On this journey, you will bring happiness to both customers and associates, improve performance indicators, take business to a new level, or even save the company from bankruptcy!

Agile is the best thing that can happen to your sales.

@Marina Alex

1. INTRODUCTION TO AGILE

1.1 What is Agile?

Agile is a company culture based on creating value for the customer. It is a special mindset shared by employees whose attention is focused on goals and the concerns of the consumer. In this frame of reference, the client becomes the boss of every associate in the company, not just the boss of the sales manager. The company is then able to function as a single organism whose purpose is to find out what the customer needs as quickly as possible and fulfill those needs faster than their competitors.

The foundation of Agile sales was created by software developers 20 years ago to support the rapidly changing requirements of their customers. The incumbent waterfall methodology (cascading principle) no longer ensured efficiency, and programmers had to switch to flexible methods.

So in 2001, the "Manifesto for Agile Software Development", now also called "The Agile Manifesto", emerged. The Manifesto introduced **4 values**:

1. People and interaction take precedence over processes and tools.
2. A working product takes precedence over comprehensive documentation.
3. Customer collaboration takes precedence over contract negotiation.
4. Responding to change takes precedence over following a plan.

To implement the Agile values, ready-made sets of techniques and methods have been created, including Scrum , Kanban, XP, LeSS, SAFe, Nexus and so on.

The SWAY system is based on Scrum.

1.2 The difference between traditional sales and Agile sales

The world of sales has changed a lot over the past 10 years. Back then, cold calls, claim management, and manipulating the client were considered effective. In fact, customers were often left with no choice: information about products and services was not readily available. It was sales managers who had all the information, and thus, the power over the customer. In those years, the main objective of the manager was to fulfill the sales plan and get a bonus.

Yet, with the advent of the internet, the situation has changed. The pace of business has changed as well: time is shorter and customer expectations have increased. Before making a purchase, the customer learns about the product or service via the internet, reads the reviews, and compares the prices. In fact, customers are often better versed on many issues than sales managers and associates. The customer values speed and expects to get answers to their questions here and now. Flexibility and speed are the key competitive advantages today.

Sales techniques are also undergoing change. Previously, it was the sales person who was speaking while the buyer had to listen carefully. Now the sales manager must listen closely to the customer and adapt in order to fulfill their needs.

In traditional sales, it is every manager for themselves. Whereas, Agile sales are conducted by a self-organized team that is dedicated to continuous improvement and functions as a single organism.

In Agile sales, the primary goal set for the Team is to create value for the customers by fulfilling their needs, and doing so quickly. Money is the feedback from the customer. Fulfillment and over-fulfillment of the sales plan indicates that the team accomplishes the task and that the clients are happy.

Traditional sales	Agile sales
Individual sales plans, goals and KPIs.	A self-organized team characterized by structured self-improvement and a common goal.
The key objective is to sell and execute the sales plan.	The primary goal is to understand the needs of the client, organize a continuous process of receiving feedback from the client, and create value for the customer faster than competitors.
The sales department is considered to be the most important division in the company since sales managers bring in money, so other departments should be at their disposal.	The company is a united team whose goal is to create maximum value for the client in the shortest possible time frame.
Sales and marketing are parallel divisions that often clash with one another.	Effective interaction between sales and marketing in a conflict-free environment that cooperates for a common purpose.
Executive management controls the sales process by assigning sales plans to employees and monitors the number of meetings, calls, etc.	The leader sets the goals, and the Agile teams decide how to achieve them. Associates have the freedom to distribute the tasks within the team as well as to make independent decisions.

“

Agile is a new business mindset; it is company culture based on creating value for the customer. Profit is no longer the goal. Profit is both an indicator of success and the feedback from our customers. Revenue growth proves that we understand the wishes of our client and we fulfill them faster than our competitors. Perhaps, in anticipating the expectations of the customer, we can create something bigger.

2. THE SWAY SYSTEM

2.1 What is SWAY?

SWAY is a new sales system founded on self-organization, cross-functionality, and a value-based approach. The effectiveness of SWAY has been proven in practice: having been successfully utilized in more than 20 countries around the world.

Sales volumes increase primarily due to the effectiveness of the system, creating value for the client, and a day-to-day interaction between sales and marketing. SWAY users have observed sales growth from 43% to 127% within a 12-month period. However, performance indicators are influenced by a combination of factors such as the professionalism of employees and support from management.

Thus, the success of the SWAY system depends on **2 key prerequisites:**

1. Active support for the implementation of SWAY is displayed by senior managers, as is their willingness to change the processes, culture, and structure of the company.

2. The professionalism of the sales and marketing specialists who are a part of the SWAY team. The SWAY system does not teach people how to sell; but sets them up for success.

SWAY - Sales with Agile - is the composite of Scrum, the principles and values from the Agile Manifesto, coaching & leadership approaches, self-organization, and years of the author's experience in sales management.

SWAY is based on three principles.

1. Continuous self-improvement and hypothesis testing.
2. Focus on creating value for the customer.
3. Ongoing interaction between sales and marketing.

Thanks to the SWAY system, not only do we make our customers happy by creating value for them but we do so faster than our competitors. We rely on:

- an established cycle of receiving feedback from the client;
- continuous hypothesis testing;
- cooperation with marketing
- short sprints and rapid improvement events

At the end of a sprint, the SWAY team presents the latest results and changes strategy if necessary. This way, the business can quickly respond to market changes. This is a clear advantage in a rapidly changing world.

2.2 Why do we need SWAY?

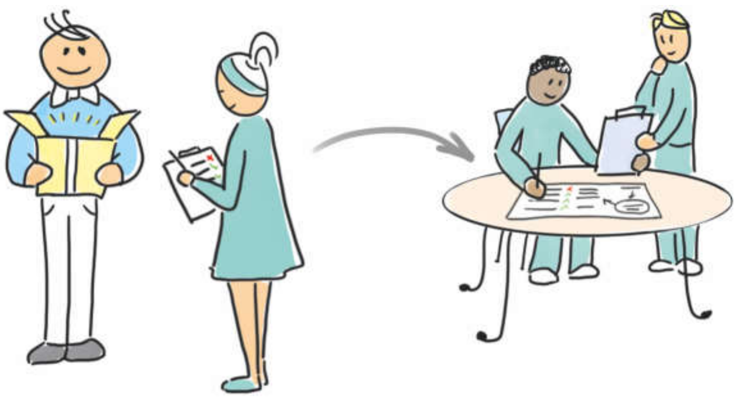
SWAY is a sales system that meets modern-day market challenges.

> A self-organized sales team focused on creating value for the customer is at the core of the SWAY philosophy. The client is the head of the process. Instead of executive managers being the focus, now the client is the boss. We are creating a completely different type of sales: we do not just sell – we collaborate with our customer to discover their needs. Then, within the shortest possible time frame, we fulfill these needs – faster than our competitors.

It is feedback from the client that clearly indicates the strengths and weaknesses of the product or service. As the main conduit to the customer, the sales department receives feedback first and then promptly communicates it to the entire company. In a matter of just a week, the company, acting as a single mechanism, quickly implements the improvements. The client's voice becomes decisive.

Thus, the SWAY team keeps exploring the needs of the customer in order to improve a product or a service – based on the quick response and well-organized work of the sales, marketing, and other departments.

As a result, the company creates the product or service that the customer needs now. The customer makes a purchase and their money is feedback. If your company meets the expectations of the customer, they will return to you, again and again, rather than to your competitors who did not manage to adapt to new conditions in a timely manner.



2.3 Where is SWAY applied?

SWAY is a simple approach that can be successfully implemented in most types of companies. Whether it is B2B, B2C, B2G, or a start-up and regardless of the length of the deal, sales cycle, or type of product or service to be sold. SWAY can be effectively applied in different business areas, industries and companies irrespective of the number of employees – whether 50 or 50,000.

2.4 Difficulties of SWAY

SWAY is not just a set of techniques or rules. It deals with the ability of every associate who embraces the value of thinking differently. In sales, rules have been established for decades, so several generations of sales professionals have learned the same old ways of thinking. However, the most difficult task is to change yourself and your habits. Therefore, when using SWAY, transformation of mindset is essential. SWAY is not just a trendy method - it is a new philosophy, and not everyone can truly endorse it.

Thus, the system is easy to describe, but difficult to follow, because it requires changes in the mindset of each employee.

Top 10 difficulties when implementing SWAY

1. The system is based on internal discipline, personal responsibility, high efficiency, and professionalism of the associates. For many companies, that is an area of growth.

2. To implement SWAY successfully, managers need to trust their employees. But not all managers are willing to let go of control and stop micromanaging.

3. Planning, prioritizing, and setting clear goals is important when applying SWAY, which can be a challenge for many companies.

4. Within first 3-6 months, the transparency of the SWAY system exposes many weaknesses of the business and the team as a whole, which is stressful for the entire company.

5. As the customer is at the top of the SWAY system, one has to alter business processes, the mindset of the sales associates, and the company structure – all to respond to customers' requests faster than competitors. The idea of change sparks resistance. "We know what our customers need and we know it better than them!" or "We would still be using wagons if Ford had listened to everything the customers were saying!" These phrases can often be heard at the start of SWAY implementation.

6. IIn the SWAY system, marketing specialists and sales representatives come together in a united team whose shared objective is to meet targets and satisfy the needs of the customers. It is necessary to change from individual KPIs to team KPIs and this transition often causes conflicts.

7. The SWAY system is based on self-organized teams which is often met with resistance from experienced sales managers who do not wish to be team players and share knowledge.

8. In the first 12 months of a SWAY implementation, up to 30% of employees may leave the company. This increases the load carried by the HR department. It has been proven vital to make changes in the recruitment process as both the professional qualities and human values of the candidate should be considered.

9. The introduction of SWAY often necessitates changes in the company's structure and business processes as it affects related divisions from the very beginning. This may provoke resistance from executives.

10. Be prepared that in the first 6 months, the team's performance may actually decrease due to the rearrangement of business processes.

These difficulties are part of a journey that leads to increased customer happiness, exceeding sales goals, and increased profitability. In extreme cases, SWAY can even save a company from bankruptcy.

2.5 Advantages of SWAY

1. Increased performance and profitability.

2. Increase in NPS (net promoter score) and customer loyalty. Customers become involved in brand development and, through their feedback, actively participate in the design of a product or service.

3. Improvement of communication and collaboration between the sales department and other divisions.

4. Increase in associates' engagement in the work process and subsequent improvement of sales results.

5. Development of a strong corporate culture marked by shared values and a sincere belief in the company's mission. Once SWAY is fully adopted, staff turnover is reduced, and associates commitment to the brand makes it is difficult for competitors to poach them.

6. Executives' abandonment of the micromanagement "operating mode". Senior management now has time to analyze the market, customers, and competitors, and to design creative ideas.

7. Development of a continuous improvement system. One SWAY team can introduce up to 300 process and system improvements per year. And, since the team is the driving force behind the changes, team members are sincerely interested in the results.

8. Effective interaction between sales and marketing; with a conflict-free environment and cooperation towards a common purpose.

9. As changes in sales effect every division, implementing SWAY accelerates the business agility transformation of the entire company.

10. The company grows closer to the client to respond quickly to market changes. Therefore, the company is able to remain successful even in a highly competitive environment.

3. THE FOUNDATIONS OF SWAY

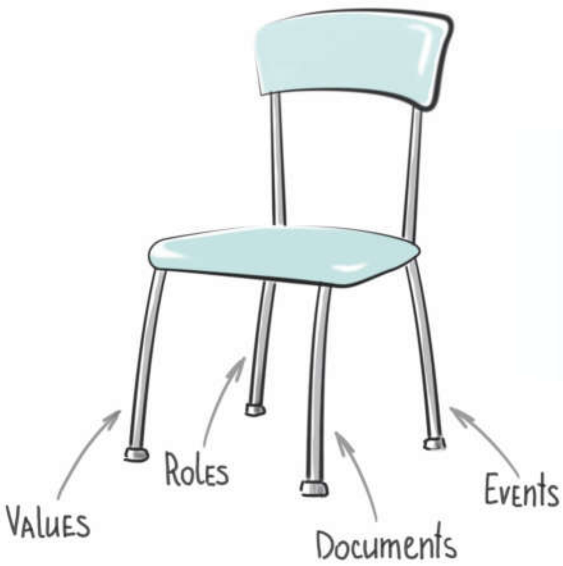
The SWAY system rests on **4 components**.

1. Values and principles (the culture of the organization).

2. Roles instead of job titles (Business Owner, Coach, Team).

3. Events (Quarterly Alignment, Quarterly Retrospective, Sprint Planning, Daily, Demo, and Sprint Retrospective).

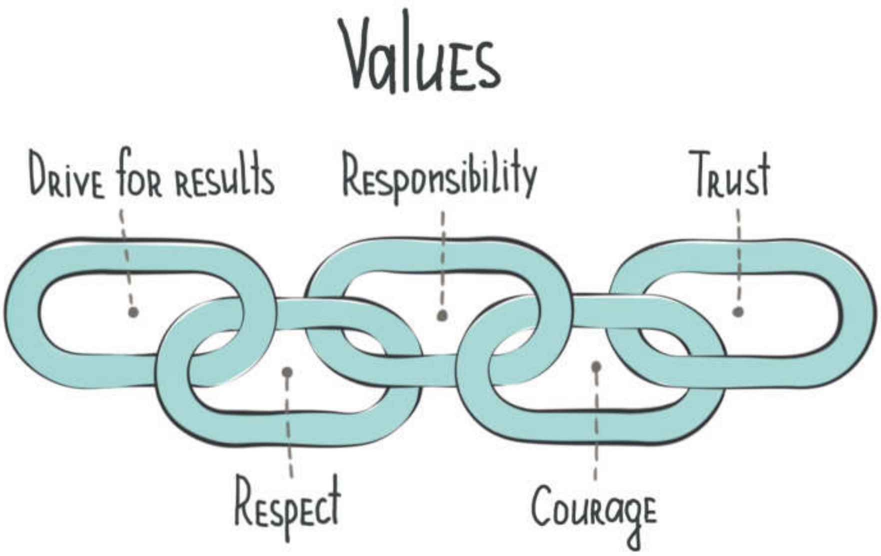
4. SWAY documents (Canvas, List of 1-month goals, Sprint goals, list of improvements).



Imagine that SWAY is a chair, where each leg is an integral part of the system. All components are equally important. If one of the legs breaks, the chair will fall, and the system will not work.

3.1 Values and principles

SWAY works effectively if employees and executives of the company embrace the values of the system and follow its principles.



Principles:

1. We create value for our client and sincerely wish to give them exactly what they need.

2. We consider ourselves and marketing a united team that works together every day. This interaction helps make our clients happy.

3. We value all departments in the company; management trusts us and encourages creativity and independence in the decision-making process.

4. Each and every one of us is eager to take responsibility and improve ourselves every day.

5. Our goal is to reach the sales targets and make our clients happy.

6. We conduct regular retrospectives which helps us improve daily.

7. Continuous testing of hypotheses, receiving feedback from our clients, and incremental improvements enable us to be leaders in the market.

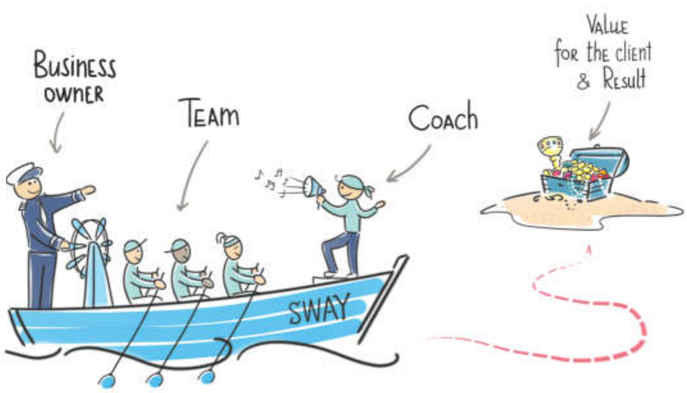
3.2 Work process within SWAY

The starting point of SWAY is filling out the Canvas.

> **The Canvas** enables a visualization of goals. It is usually filled in once every 3 months during the Quarterly Alignment event. The most important thing is to prioritize the goals and design an action plan.
>
> *For more information, see Chapter 3.6*

Next, it is necessary to assign roles within the SWAY Team. There are no job positions or titles in the SWAY system. Instead, there are **ROLES**. The **Business Owner** is responsible for the strategic vision. The **Coach** is in charge of the dynamics of the team. And finally, instead of a department where everyone is for themselves, everyone is part of a **Team** united by a shared goal. There is no hierarchy in the SWAY Team. It is a flat structure where each role implies a specific area of responsibility. However, all three roles have a unified intent.

Let's take a ship as an example. There is a captain (a Business Owner). There is a boatswain (a Coach). And there is a Team. The captain decides where the ship is going and why. The boatswain chooses how fast the team should row and what attitude the team should display. The Team are professionals inspired by a common goal.



Once the vision is defined, the Canvas is filled out, the goals are prioritized, and the roles are assigned, and it is time to organize the working space for the SWAY Team.

For more information, see Chapter 3.7

Finally, the Events (Planning, Daily, Demo, and Retrospective) need to be scheduled and a Sprint length chosen.

A Sprint is a period of time when the SWAY Team works to achieve a certain result. Each Sprint lasts 3 - 14 days, however the optimal length of the Sprint is 5-7 days.

For more information, see Chapter 3.4

3.3 Roles: Business Owner, Coach, Team

BUSINESS OWNER

The key responsibility of the Business Owner is to set and prioritize goals for the Team as well as to convey a vision of the company's master strategy.

Usually the role of the Business Owner is assumed by the director of sales. The Business Owner is an executive who has the power to make decisions – a visionary with an entrepreneurial mindset who thinks strategically.

If SWAY is applied at the top management level, the Managing Director, CEO, or the owner of the company becomes the Business Owner.

The Business Owner is responsible for the Team's results, because it is the Business Owner who explains WHAT the Team needs to do and WHY. The Business Owner also helps navigate issues with related departments at the executive level. Never forget that it is the Team who decides HOW to achieve the goals set by the Business Owner.

If the captain directs the ship into the reefs and does not listen to the advice of her crew, no matter how hard the crew tries, the ship will wreck.

The Business Owner, the Coach and the Team are united. Their interaction is built on trust.

The Business Owner

- helps the Team become fully self-organized;
- encourages employees to act independently and not be afraid of making mistakes;
- pursues continuous self-improvement and shares their findings with the Team;
- explores the needs of clients and communicates with the clients personally;
- monitors the market and competitors;
- delivers information to the Team.

The Business Owner spends about 50% of their working time with the Teams, and the remaining time is devoted to studying competitors, customer needs, market changes, and emerging innovations.

> An executive who can independently manage the budget and make decisions without the approval of higher management can become a successful Business Owner.

Top 5 Mistakes of the Business Owner

1. Performs the role of a traditional executive, controls all the processes, and tells the Team how to carry out the tasks.

2. Puts themselves above their employees yet shifts all the responsibility for the final result to the Team.

3. Pressures the Team with authority and power while suppressing employees freedom to make decisions.

4. Does not communicate with clients, does not study the market or competitors; and stays in the office and sinks into meetings with heads of other departments.

5. Acts as the Coach: immerses themselves in the Team's activities, thus, abandoning strategic vision and neglecting the needs of clients.

SWAY COACH

The key responsibility of the Coach is to create an effective and self-organized team that achieves its goals.

The Coach must possess necessary interpersonal skills; such as team coaching, facilitation, mediation, mentoring, as well as overall SWAY expertise. This is a multi-faceted role as, depending on the situation, the Coach takes up a role of a mentor, adviser, trainer, facilitator, or mediator.

A Coach is a leader who motivates the Team to exceed the sales target; looks for opportunities to help the Team achieve their goals; supports the Team and resolves internal and external conflicts; helps create an effective and high-quality communication process within the team and with related departments. conducts individual coaching sessions with Team members and the Business Owner; builds trust in the Team and expands Team horizons; encourages the Team to understand what professional skills need to be developed.

The Coach facilitates SWAY events, enables the Team to meet timeboxes, helps reach agreements between various parties in the organisation, and cultivates mutual understanding between the Business Owner and employees.

The Coach organizes Demos, Retrospectives, and other events with related departments.

On average, in a 1-week Sprint, the Coach spends around 6 hours on SWAY events.

For more information, see Chapter 3.4.

An individual can perform the role of the Coach along with their primary job responsibilities. Most often, the Coach is chosen by the Team.

Top 5 Mistakes of the SWAY Coach.

1. Manages and controls the Team or sets tasks for each employee.

2. Possesses no authority and becomes the "Secretary" of the Team (e.g., purchases stationery, marks appointments in the calendar).

3. Does not know SWAY well and cannot convey the values and principles of the SWAY system to the Team.

4. Clashes with or turns the Team against the Business Owner in order to highlight their own importance.

5. Poorly facilitates events, overruns timeboxes, and does not pay attention to the interaction with other departments.

SWAY TEAM

At the center of the SWAY system, there is a Team united by a shared goal. The Team consists of 4-9 people (including the Business Owner and the Coach) and is commonly organized in one of two ways.

A Cross-functional Team consists of employees representing different departments of the company: sales, marketing, IT, logistics, accounting, legal affairs, etc. The Team must include all employees involved in the sales cycle.

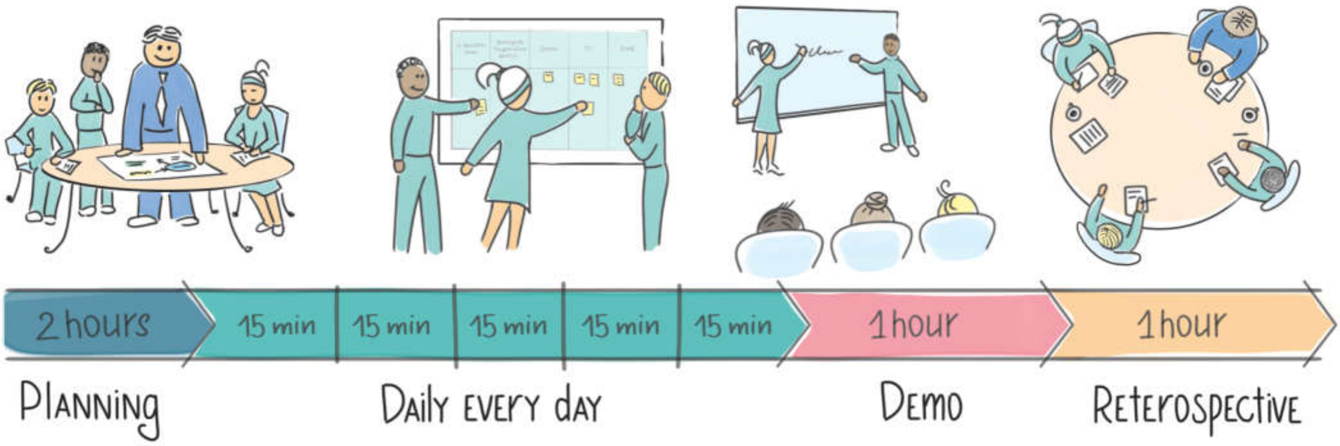
A Functional Team is usually comprised of sales professionals: a customer service manager, sales associates, pre-sales and sales specialists, etc.

> A common **MISTAKE** made while implementing SWAY is to include employees in the Team for reasons of office politics, rather than for skills that directly affect the achievement of the overall goal.

The Teams that have included both sales and marketing professionals have had the best results in meeting their targets. If the company structure does not allow for including both divisions into one team, it is possible to start using SWAY in sales and marketing departments simultaneously and conduct joint Planning, Demo and Retrospective events. In this case, two Teams start the Sprint on the same day, and the Sprint has the same length.

3.4 Events

In the SWAY system, there are **4 events** that are held as part of the Sprint: **Sprint planning, Daily, Demo, and Retrospective**.



There are also two quarterly events, the **Quarterly Alignment** and **Quarterly Retrospective** events.

The quarterly events are conducted every 3 months. At this time, all regular Sprint events are canceled so that the Team can focus on the Quarterly Alignment and Quarterly Retrospective events.

QUARTERLY ALIGNMENT EVENT

Objectives:

1) create a clear vision of what the Team needs to achieve;
2) set 3-month financial targets for the Team;
3) prioritize high-level tasks for the quarter and highlight the most valuable ones for the business (while taking into account changes in the market).

Participants: Business Owner, SWAY Coach, the Team and, if necessary, representatives of related departments.

Duration: The Quarterly Alignment event for creating a SWAY Canvas takes an average of 4-6 hours. This event is also the starting point of SWAY.

Procedure: The SWAY Canvas is placed on the wall, and participants are encouraged to stand around it. The Business Owner outlines the goals and the business strategy. After that, the SWAY Coach facilitates the event. The participants fill out the Canvas. The outcome of the meeting is that goals for all sectors for the next 3 months are set and prioritized on the Canvas.

Detailed instructions for filling out the Canvas can be found in Chapter 3.6.

QUARTERLY RETROSPECTIVE

This event helps the sales and marketing Team design a continuous improvement process for the entire company. Participants analyze the SWAY Canvas that was filled out 3 months ago.

Objectives:

1) unite sales, marketing and related departments;
2) optimize overall processes;
3) create a list of improvements.

Participants: Business Owner, SWAY Coach, the Team, and, if necessary, representatives of related departments. If the Team is not cross-functional, we recommend inviting the marketing department to all Quarterly Retrospectives.

Duration: The Retrospective for the previous quarter takes an average of 2-4 hours.

Procedure: The SWAY Coach invites the participants, organizes the space, and facilitates the event. The Coach employs various techniques to analyze the past Quarter.

At the first stage, positive feedback from all participants is collected, namely: workable solutions and positive events that occurred over the past 3 months.

At the second stage, the participants identify the solutions that did not work out; the difficulties and misunderstandings that arose between the divisions; and the goals that were not achieved and reasons why.

In the third part of the Retrospective, the participants create a clear list of improvements and note responsible parties and deadlines.

SPRINT PLANNING

Objectives:

1) prioritize and distribute tasks among Team members;
2) plan the Sprint work.

Participants: Business Owner, Coach, the Team.

Duration: up to 2 hours (depending on the length of the Sprint; the longer the Sprint, the longer the event). At the beginning of each month, the length of the Sprint planning event increases since the SWAY Team needs to analyze the Canvas and create the List of 1-month Goals document.

Sprint Planning commences the Sprint.

Procedure: The Business Owner communicates and prioritizes the goals of the Sprint, and answers the questions, "WHAT does the Team need to achieve and WHY?"

The Team:
1) breaks down the goals into tasks that can be completed within the Sprint;
2) selects the participant(s) to be responsible for each task while taking the deadlines into account;
3) identifies the needs to be fulfilled with the help of external departments;
4) determines the improvements from the previous Retrospective to be included in the Sprint.

DAILY

Objective: synchronization of the daily tasks.

Participants: Coach, the Team. If desired, the Business Owner and associates of related departments can take part in the event.

Duration: 15 minutes, every day, at the same time. The participants are encouraged to stand during the whole event. If the Team is distributed geographically, the Daily is conducted via video applications.

Procedure: The Team and the Coach gather at the SWAY Kanban Board and take turns answering 3 questions while moving the SWAY index cards from one column to another.

Three questions for the Daily:

1) What did I do yesterday to achieve the Sprint goal?

2) What will I do today to achieve the Sprint goal?

3) Do I need help?

The questions help the Team focus on Sprint goals. Likewise, they highlight several important aspects: You can immediately identify the participants who are not afraid of responsibility, and whether there exist any difficulties that can prevent the Team from achieving results.

DEMO

Objectives:

1) demonstration of sales results;
2) improvement of the entire company's processes and collaboration with related departments;
3) analysis of customer feedback.

Participants: Business Owner, Coach, the Team, company managers, marketing and logistic specialists, accountants, IT professionals, lawyers, etc. It is important to invite senior managers to the event.

Customers may be invited to the demonstration of a new service or product.

Duration: 1 hour.

Procedure: All interested parties gather in a large meeting room. The Team introduces a list of Sprint goals. The Team discusses the goals that were previously set and the results that were subsequently achieved. The Team also highlights the needs to be fulfilled by other departments in order to achieve the goals of the next Sprint. At the Demo, the Team receives feedback (comments) from related departments and discusses the feedback received from customers in the previous Sprint.

RETROSPECTIVE

Objectives:

1) continuous self-improvement of the Team;
2) analysis of financial indicators;
3) analysis of feedback received from customers;
4) list of improvements.

Participants: Coach, the Team. If necessary, the Business Owner as well as specialists of other departments are invited. If the Team is not cross-functional, joint Quarterly Retrospectives are conducted together with the marketing department.

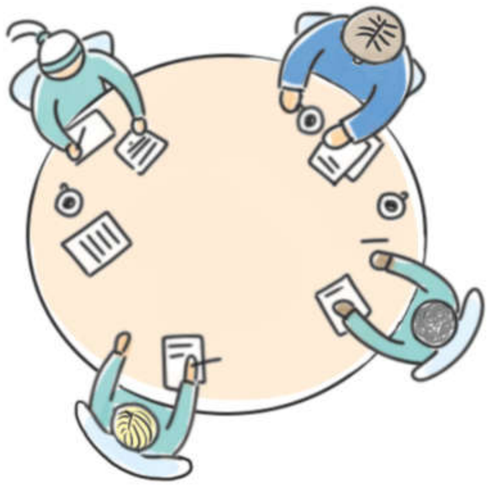
Duration: 1 hour. If specialists of related departments are invited, the duration of the Retrospective may be extended.

Procedure: The Coach facilitates each Retrospective using different techniques to analyze the last Sprint.

At the first stage, positive feedback from all participants is collected, namely, accounts of positive events and solutions.

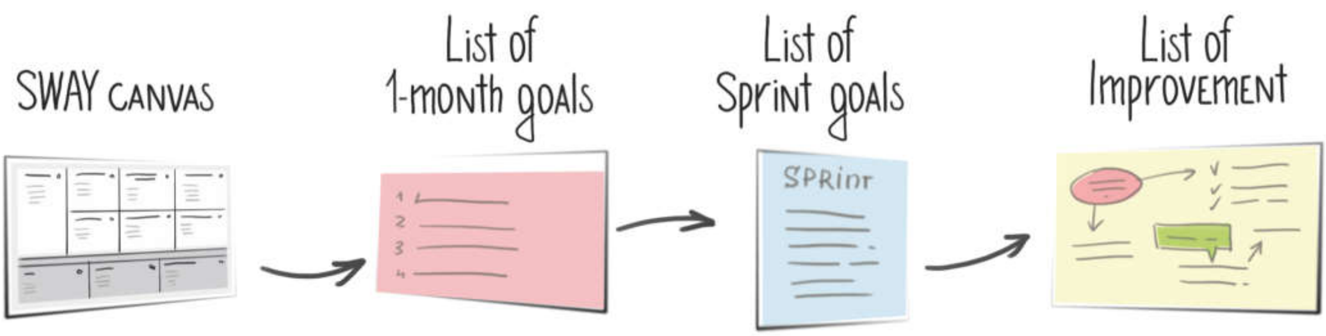
At the second stage, the participants identify failures and difficulties.

At the third stage, the Team creates a list of improvements to be implemented during the next Sprint. During the Retrospective, participants address the interaction within the Team, share feedback, and analyze conflicts and work-related processes.



3.5 SWAY documents

SWAY relies on **four documents**:



DOCUMENT 1: THE SWAY CANVAS

The Canvas is a simple and clear sales business model template; a basic tool for the SWAY Teams.

This is a schema that allows the associates to review the entire sales chain in just a few minutes, to find weaknesses, and to understand what is most important for the company.

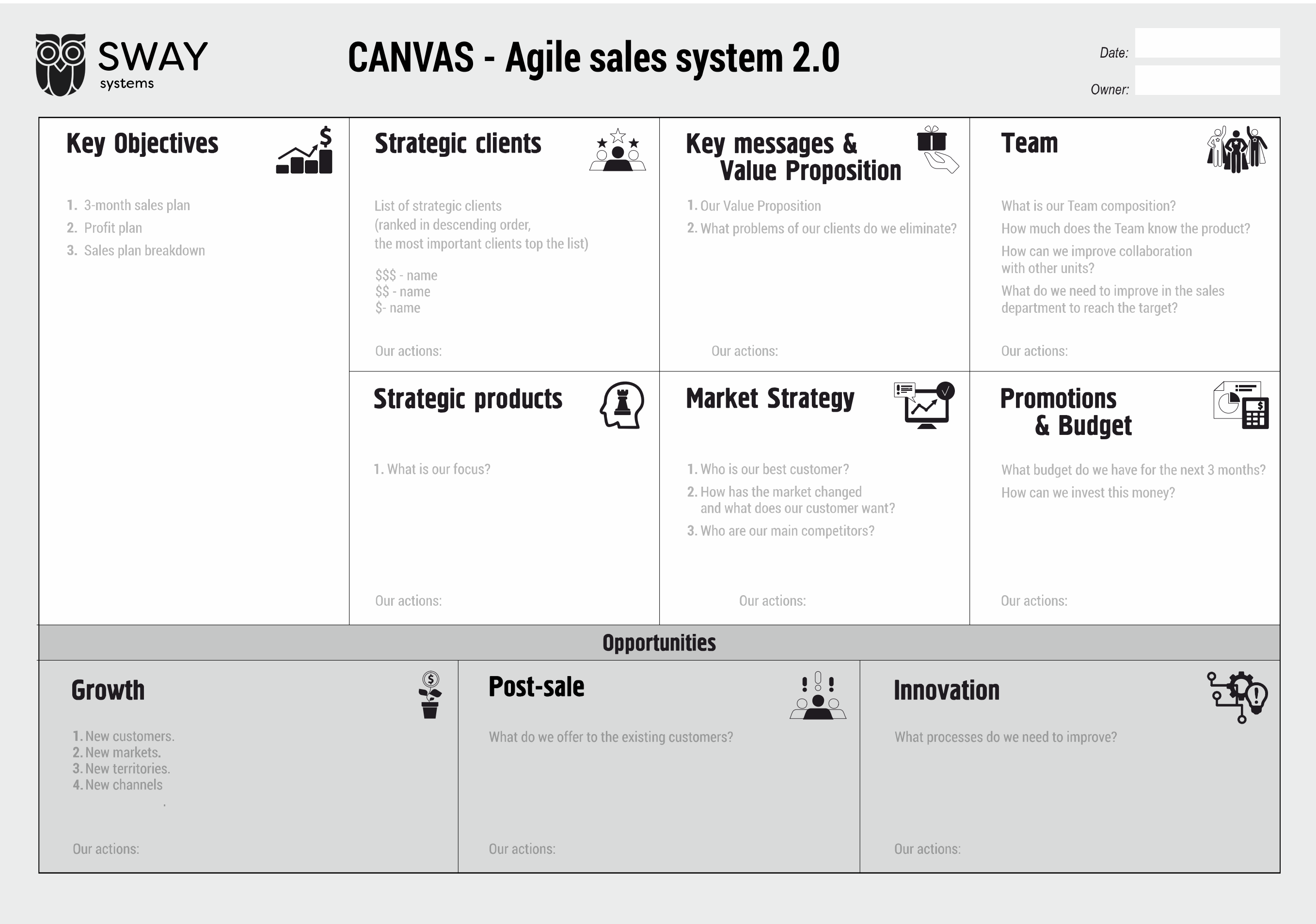
Visualization makes the work process open and understandable for the entire Team.

OUR ADVICE: print out a large template, place it on the wall, and put stickers on each block. If an idea or hypothesis turns out to be wrong, you can simply replace the sticker. That is, the strategy can be adjusted all the time.

The Canvas consists of 10 blocks: key objectives; strategic clients; strategic products; value proposition; market strategy; sales team; promotion budget; growth opportunities; post-sales opportunities; and innovation opportunities.

The Canvas is developed during the Quarterly Alignment event and updated every 3 months. The Canvas serves as the main navigator for the SWAY team.

> The SWAY Canvas belongs to the Business Owner who is personally responsible for the content of the Canvas. The Business Owner also determines the overall priorities.



DOCUMENT 2: A LIST OF 1-MONTH GOALS

The list consists of 2 parts: quantitative and qualitative goals. The Team adopts the goals from the previously filled Canvas.

> **Quantitative goals** deal with sales plans, profits, number of new customers, and other numerical indicators.
>
> *For example: sales target of $10,000,000 has been reached.*
>
> **Qualitative goals** are aimed at improving business processes, or at improving the quality of a service or a product.
>
> *For example: 100 improvements have been implemented, 200 customer interviews have been conducted, feedback has been received.*

Usually, the list of goals should contain no more than 10 items. Each goal is written down in accordance with SMART. When formulating goals, use perfective verbs (e.g., "have increased," "have been introduced/completed"). Such verbs will denote the action as completed and resultative. It is important to accentuate the result (e.g., "have made," "have called") as opposed to the process (e.g., "make," "call," "is making," "is calling").

For example : The plan to increase the profit to $1,000,000 has been fulfilled.

The goals are ranked in descending order, so the most valuable business goals are at the top of the List. The List of goals for the month should be clear to all SWAY Team members. Finally, the goals should correlate with the business strategy of the entire company.

DOCUMENT 3: A LIST OF SPRINT GOALS

This list includes the tasks that the Team needs to complete during the Sprint. As before, all tasks are written using perfective verbs. The goals are ranked in descending order, so the most valuable business goals are at the top of the List.

For example : "200 clients have been called," "20 meetings with clients have been held," "50 improvement ideas have been elicited," "30 interviews have been conducted."

The list of Sprint goals denotes specific actions that leads to the achievement of the objectives identified in the List of 1-month goals.

DOCUMENT 4: A LIST OF IMPROVEMENTS

The list of improvements is created during the Retrospective and is included in the list of goals for the next Sprint. The progress is monitored during the Daily, as well as during the Retrospective at the end of the Sprint. On average, one SWAY Team implements more than 300 improvements per year, and generates twice as many ideas. The optimal number of improvements per Sprint is 3-7. It is recommended that you create a single improvement database for analysis at the end of the year. When the Team sees HOW many improvements have been implemented, it gets a significant boost of energy which increases the Team's effectiveness and motivation.

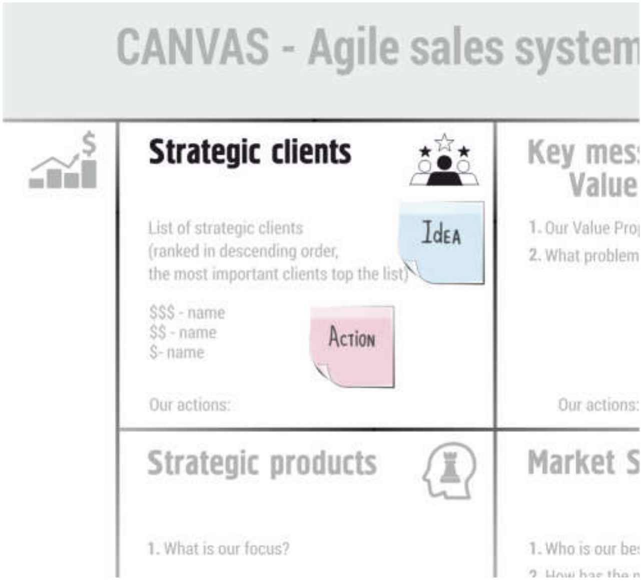
3.6 Instructions for filling in the Canvas

The Canvas is filled in every 3 months. Though, if necessary, the document can be created/updated more frequently.

Download SWAY-Canvas

1. Print out a large template (AO or A1 sized paper) and place it on the wall to make it convenient for all the participants to approach the Canvas. The Business Owner presents the vision and financial goals to be achieved by the Team. The SWAY Coach facilitates the event and helps the Team meet the time requirements. Brainstorming techniques are applied.

2. Prepare stickers of two colors. Stickers of the same color are used when the Team generates ideas and fills in each sector. After that, a 10-15 minute break is taken. Then, specific actions are written down on stickers of a different color which are then placed in the sectors. For example: Use yellow stickers for ideas, and then after the break, use blue stickers for specific actions to address those ideas, placing stickers in relevant sectors.



Try to use perfective verbs on the action/decision stickers. Such verbs will denote the action as having been completed and resultative.

If an idea or hypothesis turns out to be wrong, you can simply replace the sticker. That is, the strategy can be adjusted all the time.

3. The SWAY Canvas is filled from left to right. First, write down ideas in each of the 10 sectors, then - actions or steps that need to be completed.

4. In each segment, prioritize actions/decisions. Utilize the "Three Dollar Method": mark the most valuable business actions are noted with $$$ icon, the less important ones with $$, and so on. Then all stickers containing $$$ and $$ icons should be rewritten into the List of 1-month goals.

CANVAS SECTORS

1. Key objectives.

The key objectives that the Team needs to achieve are written using numbers: sales plan, profit plan, etc.

For example: sales plan for $2,000,000 has been completed.

2. Strategic clients. Existing clients or segments are analyzed (if they are B2C). A list of strategic (key) clients that bring the maximum profit to the company is created. Special attention should be paid to these clients within the next 1-3 months.

3. Strategic products. Priority products/services that will be the focus of attention within next 1-3 months are identified. Usually, these are either the highest-margin products or new products/services to be launched on the market.

4. Key message to the clients & value proposition. The Team pays special attention to this part of the Canvas, since it determines the value of the product/service for the client. The Participants are expected to address important questions, such as: "What problems are we eliminating for our clients?" "What value do we create for the client?" "What is our key message?"

For example: "we do not sell mattresses; we sell healthy sleep."

It is recommended to use the document "Value Proposition Canvas" which details all these issues. The Value Proposition Canvas can be printed separately on the A2 template.

Download Value proposition

5. Market strategy. In this part, the Team discusses the following points: strategy changes in the market; change of the market; our best customer; the wishes of our best customer; our main competitors; changes we notice and our response to these changes.

6. The Team. The Team evaluates itself: rating their competence and professionalism in sales from 1 to 10; knowledge of the product and the client; productivity in cooperation with other departments (potential necessity for a cross-functional team); and capability improvements needed within the next 3 months.

7. Promotion and budget. The Team determines the budget for the next 3 months as well as any investing/spending opportunities. Sometimes there may not be sufficient (or any) budget, and so the team brainstorms activities with these constraints.

Opportunities. The Team generates ideas and hypotheses that open up new business opportunities.

8. Growth. The Team determines both missed and potential opportunities for sales growth (e.g., new markets, customers, territories, sales channels). Team members formulate hypotheses that will be tested within the next 1-3 months.

9. Post-sale. The Team identifies how to build the interactions with existing customers, how to make the clients even happier, or how to bring back former clients.

10. Innovations. The Team defines what should be improved in the sales processes (e.g., introduction of a new CRM system, automation, chat-bots, new sales techniques) and suggests the improvements to be made within next 1-3 months.

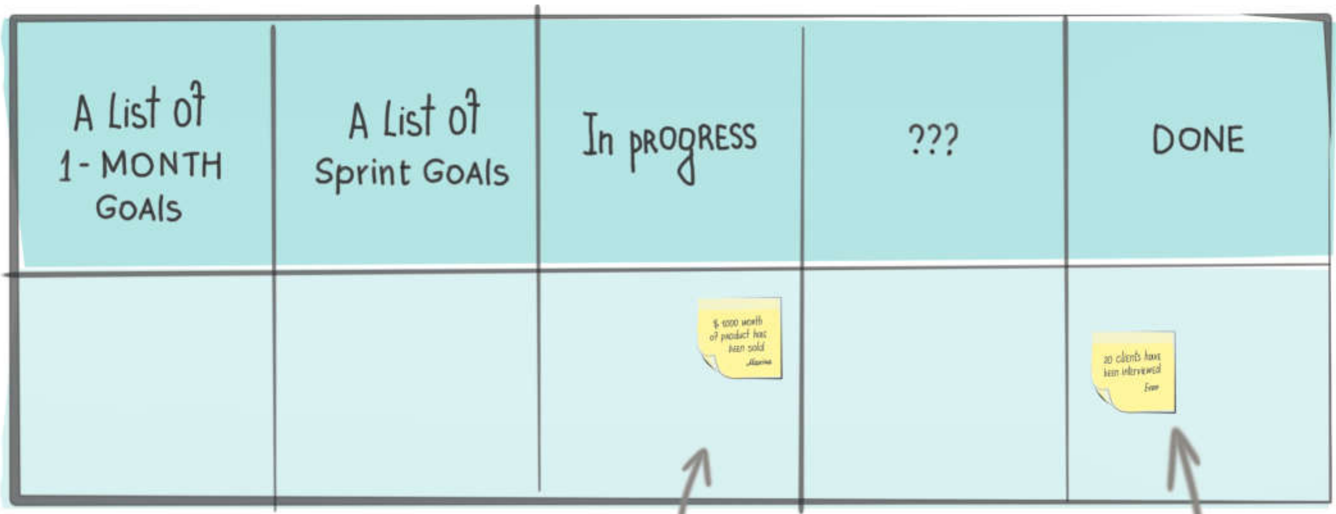
On the basis of the completed Canvas, the first List of 1-month goals is compiled, and a strategic vision for the next quarter is formed.

3.7 Organizing workspace for the SWAY Team

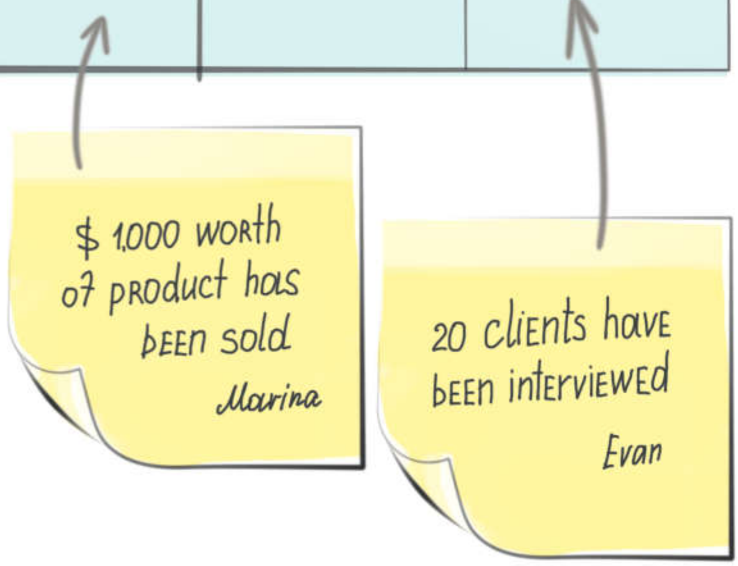
Organizing the workspace starts with creating a SWAY Kanban Board. The SWAY Kanban Board consists of **5 columns**:

1. A List of 1-month goals.
2. A List of Sprint goals (stickers with the objectives to be achieved during the Sprint).
3. "In progress" (tasks in progress that will stay in that column until the problem is solved).
4. "???" (tasks where the solution to resolve it does not depend on the Team. In these cases, even though the Team has done everything in their power, they are "stuck" with external departments or with the client).
5. "Done" (tasks that are fully completed).

THE SWAY KANBAN BOARD



The goal of the Team is to fulfill the objectives planned for the Sprint. The SWAY Kanban Board and visualization is used to assist in this process. The goals mentioned in the List of 1-Month goals are broken down into smaller tasks (actions) and written on stickers that will be moved left to right during the Sprint: from the "Sprint Goals" column into the "Done" column.



The Team can work in the same location, or their workspace can be distributed and located in different parts of the world. In both cases, appropriate setup of the workplace is essential.

Option 1. The Team is located in the same office

You need space for visualizations the SWAY Kanban Board as well as flipcharts or whiteboards for notes and presentations.

Team members communicate a lot to organize brainstorming sessions and generate ideas. The closer, physically, that marketing and sales are to each other, the better their interaction is. Although, the Team may become noisy and energetic, which should also be taken into account. We recommend that the workplace not be near a space where silence is desirable (e.g., the Finance Department).

Option 2. The Team is distributed

All interaction between Team members is carried out online. The SWAY Kanban Board is created using a web service such as Trello or Asana. Events (Planning, Daily, Demo, Retro) are held using video conferencing tools like Zoom, Skype, or Miro.

It is recommended that all SWAY events are streamed.

4. MOTIVATION AND INCENTIVES

EXAMPLES OF INCENTIVES FOR THE SWAY TEAM

The issue of monetary rewards in sales has always been important. In fact, employees have been concerned about it since the start of Agile transformations in business. But as all companies are unique, employee motivation is unique as well. Below there are some examples of successful incentive plans offered to the Teams.

At the initial stage of any SWAY transformation, the goal remains to implement the SWAY system and change the mindset of employees. Since the issue relating to salaries is always particularly sensitive, it is not always wise to change the personal motivation of employees at first, yet it is recommended to introduce the concept of a Team bonus. This is a bonus that is paid when the entire Team reaches or exceeds their targets.

2 types of Team motivation are introduced in the SWAY system.

Monetary incentives. When the Team exceeds the sales target, it receives a percentage of the business's profit or revenue, which is then divided among the Team members. A mature and well-informed Team is usually able to distribute the money independently, proportionate to everyone's invested work. However, such an incentive plan is not recommended at the very beginning of the Agile transformation as it poses a risk of conflict within the Team.

> *For example:* *A hotel did an Agile transformation. When the profit targets were reached, a certain amount of money was allocated to the entire Team, which was then distributed among the associates. The greater the profit generated by the hotel, the bigger the team bonus. The cross-functional Team of the hotel included top managers, the director of procurement, the head of the restaurant, the heads of marketing, sales, HR, logistics, etc.*

Non-monetary incentives. Having met or exceeded the sales target, the SWAY Team can receive non-financial bonuses in recognition of their achievement. Examples may include paid professional development training or business trips, gifts, or corporate holidays. The involvement of the entire Team in the selection of such a bonus is essential.

> *For example:* *In one company we launched a pilot team who, upon reaching sales goals, was to be rewarded with an internship trip to London to meet British colleagues. The idea inspired the Team members so much that the revenue increased by 50% in 7 months.*

Why is changing employee motivation so crucial? Because it forms a cohesive Team; one united by a common goal and with an agile mindset. This results in a true partnership created for the sake of reaching a common GOAL that benefits customers and encourage individuals to share discoveries, developments or problems while offering help at the right time.

For example: *a self-organized cross-functional Team consisted of both sales and marketing professionals. Team members designed their own motivation scheme they introduced professional grades (similar to belts in karate). The higher the level of professionalism displayed by the associate, the greater the monetary reward. The salaries were completely transparent, and upon the completion of another training course, the employee presented their new skills to the Team. In a way, the employee was "selling" their personal expertise to colleagues who then together made a decision on whether to bump the salary.*

In this case, the Team independently managed the budget for the duration of the year and distributed salaries and bonuses. During the year, the Team doubled their share of the company's profit. In addition, the participants had the power to hire and fire people. The company's management granted the Team complete freedom to make important decisions. The Team was self-aware, professional, and fully self-organized. Such examples are rare, because not all organizations are ready to permit the Team this level of trust and autonomy.

OUR ADVICE: try to move away from individual KPIs and refocus employee attention on achieving results as a Team, creating value for the client, and emphasizing the company's profit as opposed to making quick sales or earning personal bonuses.

5. WHERE TO START? THE FIRST STEPS OF SWAY

1. Agile: from learning to action.

- Tell your team (or the entire company) about Agile in sales. Explain the reasons for each of the Agile values and principles. Emphasize the impact that such changes will have on employees and the company.
- Involve top managers in the Agile transformation from the very beginning. Their interest in the process directly affects the success of the pilot teams.

2. Forming a pilot team. Select the departments that will be the first to switch to the SWAY system. It can be done in 3 ways.

- The wishes of the associates: ask employees who would like to join the pilot team.
- Start with the worst performing division or the parts of the business where changes are needed as soon as possible.
- The departments that interact directly with clients. Here the improvements will have the greatest effect on customer satisfaction.

3. Launching the SWAY system.

- Organize a initial training session on the SWAY system for the pilot Team.
- Assign the roles
- Fill out the SWAY Canvas and make the first List of 1-Month goals.
- Determine the length of the Sprint, schedule the Sprint events.
- Organize the workspace and create the SWAY Kanban Board.

4. Involving the entire company.

- Invite employees from related departments to the Demo.
- Visualize all the quantitative accomplishments of the pilot teams in a highly accessible place before and after SWAY implementation.
- Share your success stories.
- Involve other departments in Agile transformation.

5. Demonstration of results.

- After 3-6 months, analyze the financial performance of the pilot Teams.
- Demonstrate the results to top managers.
- Tell about the successes of the pilot Teams and initiate changes in other divisions.

I believe that **Agile** is the best thing that could happen to **sales**

@Marina Alex