

# SCALE

**The Managed Trial Play**  
Improving conversion rates

# The Managed Trial Play

## Why it's important:

Managed trials substantially increase conversion rates, reduce sales cycles and eliminate high trial extension rates.

## What it is:

A trial, sometimes called a pilot or proof-of-concept that:

- Starts with a mutual success plan to ensure buyers have skin in the game
- Conducts checkpoint meetings to ensure early activity and usage
- Produces an executive impact report to align the trial with the buyer's burning business challenges

## When to use it:

Before the proposal stage, only when a client agrees to a mutual success plan and indicates that a successful trial will lead to a purchase decision with a definitive timeframe. Tips:

- Avoid doing managed trials except when absolutely necessary to save deal time and cost
- Restrict trial access; only run them when we have a high probability of conversion
- Only extend trial timelines in rare instances with strict senior sales leadership approval

# The Managed Trial Process

## QUALIFY

TRIAL  
SET-UP  
PLAY

TRIAL  
SUCCESS  
PLAN

## EXECUTE / DRIVE USAGE

TRIAL  
KICK-  
OFF

CHECKPOINT  
MEETING(S)

END OF  
TRIAL  
MEETING

## STAKEHOLDER BUY-IN

TRIAL  
IMPACT  
REPORT

EXECUTIVE  
MEETING

## PROPOSAL

VALUE ADD  
PROPOSAL

# The Managed Trial Set-Up Play

**Objective:** Qualify the buyer in or out of a trial. Eliminate two of the biggest reasons for non-converting trials: not managing expectations or getting the right people involved.

STEP	ACTION	DESCRIPTION
1	PAO	Present meeting purpose, agenda and outcome(s)
2	Co-create Trial Success Plan	Use the Trial Success Plan worksheet to build a plan <u>with</u> the customer
3	Conditional close	Verify their plans to move forward with your solution if the trial goes well
4	Next steps	Close for a trial kickoff meeting; schedule it then and there
5	Email recap	Recap and attach trial success plan. CC internal technical resources and all client stakeholders that are part of the decision making process



**Critical question:**  
“If the trial confirms that our solution can solve your challenges, what happens next”

# The Managed Trial Success Plan Worksheet

ACCOUNT DETAILS	
Account	
Decision maker	
Potential investment	
Investment timeline	
Pilot length	

TOPIC	DETAILS
Business goal	
Pilot success criteria	
Solution timeline / buying process	
Stakeholders	
Technical resources	
Required integration	
Notes	

**Best Practice:**

1. To qualify for a trial, the buyer must share:
  - what they're solving for
  - their budget
  - timeline
  - the decision maker and decision making process
  - what happens if the trial goes well
  - commit to a post trial executive meeting
2. Complete this collaboratively with the client. Scope creep on metrics can be a big challenge in trials
3. Make trial extensions contingent upon strict Sales leadership approval. Top converting trial programs have less than a 5% extension rate

# The Managed Trial Kickoff

**Objective:** Ensure that lack of usage does not cause the trial to fail. Avoid delays in the sales cycle by granting unnecessary trial extensions.

STEP	ACTION	OBJECTIVE	EXAMPLE
1	<b>PAO</b>	Present the meeting purpose, agenda, and potential outcome(s)	"The purpose of today's meeting is to kickoff the __ day trial. The agenda is... The target outcome is..."
2	<b>Review Trial Success Plan</b>	Walk through the key elements of the Trial Success Plan, elicit feedback, and get verbal confirmation of each element	"This is our understanding of the key elements for the trial. Is this right? What's missing? What needs to be updated"
3	<b>Share best practices</b>	Discuss proof-of-concept best practices and precautions to take before starting	"Our recommendations for maximizing the value of the trial based on our experiences with customers are as follows:..."
4	<b>Next steps</b>	Schedule or confirm checkpoint Meeting(s)	"Let's open up our calendars now and schedule the checkpoint meeting(s) to ensure you're getting the support and experience you need."
5	<b>Email recap</b>	Recap kickoff plan. CC: key stakeholders not in attendance	"Thank you for... The goal of the trial is to... The trial duration is... The checkpoint meeting and final executive summary meeting are on the following dates... The next step is an initial checkpoint meeting on..."

# Checkpoint Meeting

**Objective:** Engage with the buyer during the trial to ensure usage. Surface lack of adoption and key issues early to avoid ‘extension requests’

STEP	ACTION	OBJECTIVE	EXAMPLE
1	<b>PAO</b>	Present the meeting purpose, agenda, and potential outcome(s)	“The goal today is to assess trial progress, get your initial feedback, and see what questions have come up. If we identify any issues, we’ll resolve them on this call or with a quick follow up.”
2	<b>Reiterate trial objectives</b>	Restate or review the objectives in the Trial Success Plan	“The goal of the trial was to...”
3	<b>Confirm activity</b>	Validate customer’s progress	“Tell me about what you’ve done so far.”
4	<b>Get feedback</b>	Ask for buyer’s perception of the trial and solution to date	“What are your perceptions of the trial and our solution to date?”
5	<b>Recap</b>	Summarize buyer feedback, recommendations and remaining milestone	“Thank you for your input. Here’s how I would summarize what you shared today ... Our recommendations are....Here’s what’s left to do....”
6	<b>Next steps</b>	Confirm next checkpoint meeting	“The trial ends on... Our next meeting is... on...”

# End-of-Trial Meeting

**Objective:** Engage with the buyer during the trial to ensure usage. Surface lack of adoption and key issues early to avoid ‘extension requests’

STEP	ACTION	OBJECTIVE	EXAMPLE
1	PAO	Present the meeting purpose, agenda, and potential outcome(s)	“The goal today is to assess trial progress, get your initial feedback and see what questions have come up. If we identify any issues we’ll resolve them on this call or with a quick follow up.”
2	Reiterate trial objectives	Restate or review the objectives in the Trial Success Plan	“The goal of the trial was to...”
3	Confirm activity	Validate customer’s progress	“Tell me about what you’ve done so far.”
4	Get feedback	Ask for buyer’s perception of the trial and solution to date	“What are your perceptions of the trial and our solution to date?”
5	Recap	Summarize buyer feedback, recommendations and remaining milestone	“Thank you for your input. Here’s how I would summarize what you shared today... Our recommendations are... Here’s what’s left to do...”
6	Next steps	Confirm next checkpoint meeting	“The trial ends on... Our next meeting is... on...”



# Executive Meeting

**Objective:** By presenting a summary of the trial impact report to the champion, economic buyer, and other executive stakeholders involved in the decision making process to 1) align the trial to their business objectives and pain, 2) differentiate through insights, and 3) get to the decision makers involved earlier

STEP	ACTION	OBJECTIVE	EXAMPLE
1	PAO	Present the meeting purpose, agenda, and potential outcome(s)	"The purpose of today's meeting is to review the trial ... the agenda is review the original trial objectives, get your perceptions of the trial and our solution and share our findings and takeaways. The outcome is to determine your intention to move forward with our solution and, assuming you intend to, develop a mutual success plan with timelines for moving forward."
2	Recap	Summarize the goal and trial success criteria from the trial success plan	"The goal of the trial was to..."
3	Get feedback	Get their perception of the trial and trial experience	"Before we share our findings and mutually share our perceptions, we would like to understand your current perceptions of the trial, the trial experience, and the solution."
4	Share Impact Report	Shape the value narrative around you, your solution and company	"Here is a summary of what we did, what we found, and our insights on your business."
5	Next steps	Confirm their intent to move forward, schedule proposal meeting	"Typically when we have a proof-of-concept that has been successful like this, the next step is to put together a proposal and have a 30 minute meeting to review the proposal with the executive decision makers. How would you like to move forward from here?"
6	Short email recap	Confirm next steps with all key stakeholders and attach executive impact report	"The trial ends on... Our next meeting is... on..."

# The Managed Trial Executive Impact Report

SECTION	KEY ELEMENTS
<b>Executive summary</b>	Business goals <span>1</span>
	Success criteria
	Key challenges
<b>Trial overview</b>	Recap of timeframe
	Key stakeholders
	Recap of key activities
<b>Trial results</b>	Success criteria results
	Key challenges results
	Industry benchmarks
<b>Insights</b>	Key insights based on trial findings and benchmarks <span>3</span>
<b>Solution summary</b>	Summary of success (versus business goals)
	Recommendations on how to improve their business
<b>Next steps</b>	Proposed next steps (proposal meeting)

1 Ground the report in buyer's business goals and challenges

2 Anchor trial results in the buyer's business goals and challenges

3 Provide insights, ideally on past benchmarked trials. Make business recommendations

## Best Practices:

1. Adapt the length and depth of the Executive Impact Report to the length and complexity of the trial and required investment to adopt the solution. This can be a 1-2 pager or a more weightly 8-10 page report.
2. Differentiation happens in the Insight section and through your recommendations on how to improve their business.
3. If the trial went well, proactively seed the next step by indicating that it's typically a 30 minute proposal meeting vs. asking an open ended 'what's next?'