



UNIVERSITY
OF BUSINESS
AGILITY

SWAY

FRAMEWORK guide



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1. What is SWAY?

SWAY is a new sales building system that is founded on personal leadership, cross-functionality and value-based approach.

SWAY, which stands for Sales with Agile, is suitable for the target-oriented companies who are interested in creating happiness and value for the customers. SWAY rests on Scrum framework and Agile philosophy as well as coaching-based approach and leadership principles. SWAY helps to achieve a 3-4 time increase in sales within 6 months: all due to the efficiency of the system and full engagement of the employees.

SWAY was designed by Marina Alex who used her experience in implementing Agile into sales.

SWAY is based on the following principles:

Continuous self-development

Discipline and target orientation

Love for people/customers

2. Why do we need SWAY?

We are living at the time when the purchasing process is regulated by the buyer, not the seller. Today, it is the buyers - the customers - who play a major role in establishing relations with the sellers whom they have chosen independently. Traditional sales models are outdated. The era of annoying cold calls and poor quality service provided by the companies who do not respect the clients has finally come to an end.

Nowadays, speed and flexibility are the key competitive advantages. SWAY is a sales building method that meets the challenges set by the modern markets.

3. Where can SWAY be applied?

SWAY can be applied in the companies whose culture is focused on the customer and caters to the customers' needs (namely, creating value).

SWAY is successfully implemented in:

B2B

B2C

B2G

Start-ups

4. SWAY: the basics

Five components of SWAY are:

1. values and principles (culture)
2. roles as opposed to positions (Business Owner, Coach, Team)
3. events/sessions (Planning, Daily, Demo, Retrospective)
4. documents (Canvas, list of Sprint goals, list of improvements)
5. visualization (SWAY boards, index cards)

5. Values and Principles

SWAY is successful when both the employees and the management convey the following values and principles:

Values:

1. Respect
2. Responsibility
3. Trust
4. Courage
5. Focusing on the target

Principles:

1. The most important for us is to create the value for the customer as we sincerely wish to give the client exactly what he/she desires.
2. We recognize the value of marketing, we work with marketing professionals on the daily basis. This interaction allows us to make the client truly happy.
3. We work in the team and as a team. The management trust us while encouraging our creativity and independent decision-making process.
4. Each of us is not afraid of shouldering responsibility and is eager to develop ourselves every single day.
5. Our goal is to fulfill the sales plan while creating the value for the customer.
6. Regular retrospective meetings are the part of our culture as the sessions allow us to keep learning and improving.
7. Hypothesis verification, experiments and innovation allow us to be the leaders on the market.

6. Incentives

Incentive for the Team, Business Owner and Coach depends on the target (sales plan) achieved by the whole team.

Monetary incentive: bonus is paid equally to all the members of the SWAY team (Business Owner, Coach, Team)

Non-financial incentive: upon exceeding the target sales, bonus is allocated to the whole team. Bonus is to be spent at the end of the year. The team makes a joint decision on how to spend the bonus.

7. Sprint - the time frame when the team reaches the set goals and demonstrates the results to all the interested parties. Sprint can take 3 - 14 days (the most optimal duration of Sprint is 7 days).

Every sprint is focused on the goal to be reached by the team. The goal should be verbalized in one sentence. The objective should be specific, clear and understandable (in accordance with SMART).

After a three month period, the SWAY team is given one week to recharge and reload. SWAY-free week. Sprint zero.

8. Roles: Team, Business Owner, Coach.

SWAY relies on the Team, the Business Owner, and the Coach

The Team

4-9 persons

Team compositions:

Cross-functional Team where participants represent various fields (sales, marketing, IT, logistics, accounting, law, etc). All the team members are interested in the sales project from its commencement to the conclusion.

Functional Team consisting of the sales professionals (client manager, inside sales associate, pre-sale и sales managers, and so on).

The team can be localized at the same place or be dispersed geographically in which case all events and sessions are to be conducted online (ZOOM, Skype, TRELLO, Asana, Realtimebord, CRM, etc.)

Business Owner

A Leader who is empowered to make decisions. A professional sales manager, the Business Owner is also a Visionary who is gifted to be a strategic thinker.

The Business Owner is responsible for fulfilling the sales plan. The Business Owner guides the team on "what is to be achieved" and sets the priorities. Yet, it is the team who decides HOW to achieve the goals set by the Leader.

The Business Owner spends half of their time working with the Team while the other half is devoted to the research of the customers' the needs, monitoring the changes happening on the market as well as emerging innovations in the sphere of sales. The Business Owner is responsible for implementing the innovations in the sales process as well as establishing the quality interactions with other divisions of the company.

One Business Owner manages no more than 5 SWAY teams at the same time.

SWAY coach

Skills: team coaching, facilitation, mediation, mentoring, SWAY expertise.

SWAY coach works with the team. The goal of the SWAY coach is to build a self-organizing and extremely effective team which is bound to fulfill the sales plan.

SWAY coach motivates the team and tackles the obstacles standing in the way of reaching the target. SWAY coach works towards establishing a quality communication both within the team and with external divisions, removes the obstacles preventing the team from achieving the goal, and solves the conflicts. SWAY coach conducts individual coach sessions with the team members and the Business Owner.

SWAY coach is responsible for facilitation of the SWAY sessions as well as organization of the team building events.

One SWAY coach can guide up to 2 teams at the same time.

9. Events: Planning, daily, demo, retrospective.

Planning Sessions

Participants: the Business Owner, the Coach, the Team

Time frame: SWAY Canvas 3 month planning session last up to 8 hours. This event commences SWAY.

Spring Planning Session lasts up to 2 hours provided Sprint sessions are conducted weekly.

The Purpose of the Planning is setting the goals, prioritization, task allocation as well as setting the strategy for task execution.

Procedure:

During the Planning Session, Business Owner speaks of and prioritizes the Sprint goals while highlighting the reason (WHY) and the purpose (WHAT FOR) the team works towards the goals.

The Team transforms the goals into tasks, chooses the persons to be in charge of the tasks with regards to the deadlines, determines the necessary assistance expected from the divisions, defines improvement goals for the Sprint session based on the results achieved in the Retrospective Sessions.

Daily Sessions

Participants: Coach, Team. Participation of Business Owner and the division managers is optional.

Schedule: 15 minutes, daily. The Participants are expected to be standing upon the whole time of Daily. If the Team is dispersed geographically, Daily Session is conducted via video applications. The goal of the Daily Sessions is to focus on everyday tasks.

Procedure: the Team and the Coach gets together at the SWAY board and answer three questions one by one while moving the index cards from one column to another.

E.g.

What was I doing yesterday to achieve the Sprint goals?

What am I doing today to achieve the Sprint goals?

Do I need the help?

Demo Sessions

Participants: the Team, the Coach, the Business Owner, marketing specialists, logistics specialists, accountants, IT specialists, lawyers, representatives of any other relevant departments whose involvement is necessary for the improvement in sales as well as all the specialists who might make an impact on determining the Sprint goals.

The customers are also invited to participate in the Session to provide the feedback or to receive the information on the new service/product.

Duration: 1 hour.

Procedure: All the interested parties are gathered at the conference room. The Team brings forward the Sprint goals and the SWAY Canvas. The Team is to demonstrate what objectives were set, what difficulties were encountered and which divisions were contacted as to achieve the goals for the next Sprint Session.

The Purpose: is to demonstrate the result and improve organizational processes with a view to achieve the goals set for the SWAY team.

Retrospective Sessions

Participants: Team members, Coach. Business Owner as well as the representatives of the other divisions are invited upon request. Joint retrospective sessions which include marketing specialists are conducted monthly if the team is not cross-functional.

Duration: 1 hour. Joint retrospectives lasts from 2 to 6 hours.

Procedure: The Coach facilitates Retrospective session while utilizing various techniques to analyze the Sprint. The first stage consists of collecting feedback from the participants (e.g. What worked? What was good? etc). The second stage allows the participants to recall and analyze what went wrong and what difficulties were encountered. During the third stage, the participants are to create a clear list of improvements to be achieved by the next Sprint.

The Purpose: constant and continuous self-development of the team with a view to create an effective and united team of happy employees who not only fulfill their own sales plans but also create the values for their customers.

10. Documents: Canvas, the List of 3 months Goals, the List of Sprint Goals, the List of the Improvements.

Document 1: SWAY Canvas

10 sections (Key Objectives, Strategic clients, Key Messages & Value Proposition, Marketing strategy, Strategic Products, Sales team, Promotion Budget, Growth, Up-sell, Innovation)

UBA SWAY - Agile sales framework 1.0		Date:	Owner:
Key Objectives  Sales target for next 3 months.	Strategic clients  List of strategic clients. \$\$\$, \$\$, \$	Key messages & Value Proposition  How does our offering address our customer's pain or value	Sales Team  What is the composition of the team. How much do they know the product. How do we improve collaboration with other units. What do we need to do to improve.
	Strategic products  What is our focus.	Market Strategy  Who is our best customer. How has the market changed and what does our customer want. Who are our main competitors.	Promotions & Budget  What budget do we have for these 3 months. Where do we want to invest this money.
Opportunities			
Growth  New customers. New markets. New territories. New sales. New channels.	Upsell  What do we offer existing customers.	Innovation  What processes can we change to be more effective.	

The content of the documents is proposed by the Business Owner and the heads of the divisions who set the strategy.

SWAY Canvas is designed every 3 months and is the basis for making a list of goals set for the 3 month period.

Document 2: the List of 3 months Goals

This 2-part document outlines qualitative and quantitative goals where:

Quantitative goals encompass the sales plan, the number of new customers as well as other indicators that can be quantified.

Example: Sales plan: 10 000 000\$

Qualitative goals are directed to the improvement of the business processes, service quality, interviews with clients in order to measure satisfaction of the client upon the use of the service/product, etc. Those are the goals that correspond to the happiness our customer is bound to feel upon using our product or service.

The list of the goals to be achieved in a 3 month period cannot include more than 10 targets. Every target is written down in accordance with the SMART method and is verbalized in the form of the verb. Obviously, the most important goals top the list.

Example:

Customer Development: 20 key customers are to be contracted by November 20, 2019.

3 month goal lists should be accessible and understandable for all the members of the SWAY team. The list should also correspond to the strategy set by the team.

Document 3: The List of Sprint goals

The list is to include the targets to be achieved by the team within the Sprint time frame. All the targets are to be verbalized in the verb form

The most valuable tasks are listed at the top of the list.

Example: Call 200 clients, organize 50 meetings, conduct 30 interviews, and so on.

The list of Sprint goals implies concrete actions that are to lead to the result within a 3 month period.

Document 4 - The List of Improvements

The list of improvements is made during the retrospective session and is included in the list of goals set for the next Sprint. The team bears responsibility for fulfilling all the goals. This is to be monitored/controlled at the Retrospective Session at the end of the next Sprint.

The optimal number of improvements per 1 sprint is 3-7.

11. Visualization.

SWAY board contains 4 columns: the list of 3 month goals, the list of Sprint goals + major Sprint goal, and the columns which outline the tasks in process ("DOING") as well as the accomplished ones ("DONE").

Backlog	TO DO The goal of our sprint is...	DOING	???	DONE

SWAY boards is located at the most prominent place in the team office. Each employer has his/her own task.

Example:



12. Specifics of the Dispersed Teams

Dispersed SWAY teams conduct all the SWAY events with the use of the video. Subsequently, it is deemed crucial to organize the space for the SWAY board as well as the documents and communication channels. One channel is to be set for the "flood" conversations. All communication is encouraged to be conducted via the video equipment.

13. Feedback

Success in SWAY implementation rests on 3 components:

- company culture;
- professionalism of the employees;
- ability to provide feedback on every level of the hierarchy

Feedback should be specific, positive, constructive, and encourage future development.

Would you like to know more?

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