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1. What is SWAY?

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

SWAY, which stands for Sales with Agile, is suitable for the target-oriented companies that are interested in creating happiness and value for the customers. SWAY rests on the 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 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 SWAY?

We are living in a time when the purchasing process is regulated by the buyer, not the seller. Buyers have access to more information than ever before when choosing which companies to buy products and services from. Traditional sales models are outdated. The era of annoying cold calls, poor quality service, and companies that do not respect their clients has finally come to an end.

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

3. Where can SWAY be applied?

SWAY can be applied in those companies whose culture is focused on customer and caters to the customers’ needs. Those companies whose focus is to create value.

4. SWAY: the Basics

The five components of SWAY are:
1. Values and principles (the organizational culture)
2. Roles (as opposed to positions): Business Owner, Coach, Team
3. Events: Quarterly Planning, Sprint Planning, Daily, Demo, Retrospective
4. Documents: SWAY Canvas, Quarterly Goals, Sprint Goals, Improvement Goals)
5. Visualization: SWAY boards, index cards

There are three critical factors inside your organization that are required for SWAY to be successful:

1. A culture that puts the customer first and promotes a happy workplace.
2. Professionalism in sales staff that takes leadership and pride in their work.
3. An ability to provide feedback on every level of the hierarchy. Feedback should be specific, positive, constructive, and encourage future development.

5. Values and Principles

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

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

1. We will create value for the customer as we sincerely wish to give them exactly what they desire.

2. We recognize the value of marketing and work with marketing professionals on a daily basis. This interaction allows us to make the client truly happy.

3. We work in the team and as a team. 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. We hold regular retrospective events to keep learning and improving.

7. Hypothesis verification, experimentation and innovation allow us to be the leaders in the market.
6. Incentives

Incentive for the Team, Business Owner and Coach are shared when the target (sales plan) is achieved.

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

Non-financial incentives: teams can be given non-financial bonuses (e.g. gifts, holidays, or social events) upon exceeding the sales target. The whole team should be directly involved in choosing what and how to allocate this bonus at the end of the year. In addition, social incentives, such as recognition by peers, customer happiness, and social status (e.g. titles or awards) are very powerful and are often used in SWAY teams.

7. SWAY workflow

Monthly Planning
Monthly planning sessions.
Once a month during the Sprint planning sessions, special time for SWAY Canvas analysis is allocated. In the process, the team, SWAY coach, and the Business Owner prioritize remaining tasks and list the goals for the following month. Filled-in SWAY Canvas as well as a complete list for goals for the following month mark the results of the quarter planning.

Sprint
The sprint is the time frame where the team defines their short-term goals, works together towards them, and demonstrates the results to all the interested parties. Each sprint can take between 3 to 14 days, however, 7 days historically is the optimal duration.
8. Roles: Team, Business Owner, Coach

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

The Team
4-9 people

Team composition:
· Cross-functional Team where participants represent various fields (e.g. sales, marketing, IT, logistics, accounting, law, etc). All the team members have interested in the sales project from its beginning to the conclusion.
· Functional Team consisting of the sales professionals (client manager, sales associate, pre-sale, sales managers, and so on).

Business Owner

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

The Business Owner is accountable for fulfilling the sales plan. They also guide the team on “what is to be achieved” and sets the priorities. However, it is still 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 researching the customers’ needs, monitoring the changes happening on the market, and emerging innovations in sales. The Business Owner is responsible for implementing the innovations in the sales process as well as establishing quality interactions with other divisions of the company. One Business Owner manages no more than 5 SWAY teams at the same time.
The SWAY coach works with the team. The goal of the SWAY coach is to build a self-organizing and effective team to fulfill the sales plan.

The SWAY coach motivates the team and tackles the obstacles standing in the way of reaching the target. The SWAY coach works towards establishing quality communication; both within the team and with external divisions, removing obstacles that prevent the team from achieving their goal, and solves any Team conflicts. The SWAY coach conducts individual coaching sessions with their team members and the Business Owner as needed.

The SWAY coach is responsible for facilitation of the SWAY events as well as organizing the team building events. The SWAY coach ensures that SWAY events take place on schedule.

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

**Quarterly Planning Event**

**Participants:** Business Owner, SWAY Coach, Team

**Time frame:** The Quarterly Planning Event to build the SWAY Canvas will take up to 8 hours. This event commences SWAY.

**Procedure:** The sales departments brings all SWAY Teams and stakeholders (e.g. marketing, finance, or product) into the quarterly planning event. The SWAY Canvas is displayed on the wall and participants are encouraged to stand around it. The Business Owner outlines the high-level business objectives and strategy. Following that, the SWAY Coach introduces the Canvas and starts to facilitate the event.

**Sprint Planning Event**

**Participants:** Business Owner, SWAY Coach, Team

**Time frame:** The Sprint Planning event lasts up to 2 hours (per week of sprint length)

The Purpose of the Sprint Plan is to set the goals, prioritization, and task allocation for the sprint. At the end of each month, the duration of the Sprint planning sessions increases, as SWAY team needs extra time to analyze SWAY Canvas and list the goals for the following month.

**Procedure:** During the Sprint Planning event, the Business Owner speaks of, and prioritizes, the goals for the Sprint. They also highlight the reason (WHY) and the purpose (WHAT FOR) that the team works towards these goals.

The Team transforms the goals into tasks, chooses the person-in-charge for each task assigns deadlines, determines the necessary assistance expected from external divisions, and defines improvement goals for the Sprint based on the outcome of the Retrospective event.
Daily Event

Participants: SWAY Coach, Team. Participation of the Business Owner and division managers is optional.
Schedule: 15 minutes, daily. The participants are expected to be standing during this event. If the Team is geographically dispersed, the Daily event is conducted via video streaming. The goal of the Daily event is to focus on everyday tasks.
Procedure: The Team and the Coach get together at the SWAY board and answer three questions, one by one, while moving the SWAY cards from one column to another. The three questions are; what was I doing yesterday to achieve the Sprint goals? What am I doing today to achieve the Sprint goals? Do I need any help?

Demo Event

Participants: Team, SWAY Coach, Business Owner, business executives, specialists from any other relevant department (e.g. marketing, logistics, accountants, IT, lawyers) whose involvement is necessary to improve sales or who might make an impact on determining the Sprint goals. Customers may also be invited to participate in the event to provide feedback or receive information on new services or products.
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 demonstrates what objectives were set, what difficulties were encountered, and which divisions collaborated to achieve the Sprint goals.
Purpose: To demonstrate the sales results and improve organizational processes with a view to achieve the goals set by the SWAY team.
Retrospective Event(s)

Participants: Team, SWAY Coach. The Business Owner, as well as the representatives of other divisions, are invited upon request. Quarterly retrospective events with marketing specialists are conducted if the team is not cross-functional.

Duration: 1 hour. Quarterly retrospectives last from 2 to 6 hours.

Procedure: The SWAY Coach facilitates each Retrospective event 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 create a clear list of improvements to be achieved by the next Sprint.

The Purpose: Constant and continuous self-improvement with a view to create an effective and unified team of happy employees who not only fulfill their own sales plans but also create value for their customers.
10. SWAY Documents

Document 1: SWAY Canvas
10 sections (Key Objectives, Strategic Clients, Key Messages & Value Proposition, Marketing Strategy, Strategic Products, Sales Team, Promotion Budget, Growth Opportunities, Up-sell Opportunities, Innovation Opportunities)

The content of SWAY Canvas is developed during the Quarterly planning event. It is redesigned every 3 months and forms the basis for making the 3 Month Goals document.

Document 2: Month Goals
This 2-part document outlines both the qualitative and quantitative goals for the quarter.
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 direct the improvement of the business processes, service quality, or client interviews, in order to measure client satisfaction with the use of the service or product.

The list of the goals to be achieved in a month period should not include more than 10 targets. Every target is written down in accordance with the SMART method and is written in the form of the verb. The goals are listed in priority orders.

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

The Month Goals should be accessible and understandable for all the members of the SWAY Team. The goals must also correspond to the business strategy.

**Document 3: Sprint Goals**

The Sprint Goals include the specific targets to be achieved by the team within the Sprint timeframe. The most valuable tasks are listed at the top of the document and are to be written in the form of a verb.

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

The Sprint Goals imply concrete actions that should lead to a result within the 3 month period.
The Improvement Goals document is created during the Retrospective event and is included in the Sprint Goals. The team bears responsibility for fulfilling all the improvement goals. This is to be monitored and controlled through the Retrospective event at the end of the next Sprint. The optimal number of improvements per sprint is between three and seven.

11. Visualization.

SWAY boards are located at the most prominent place in the team office.

The SWAY board contains 4 columns: the 3-Month Goals, the Sprint Goals, and the columns which outline the tasks in process ("DOING"), and those completed ("DONE"). The special “???” column holds any tasks that is blocked by an external department or client.

<table>
<thead>
<tr>
<th>3 - MOUNTH Goals</th>
<th>Sprint goals</th>
<th>DOING</th>
<th>???</th>
<th>DONE</th>
</tr>
</thead>
<tbody>
<tr>
<td>The goal of our sprint is...</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
3-Month Goals | Sprint Goals | DOING | ??? | DONE

SWAY boards use a special card to clearly describe the work that each employee is responsible for. There are 3 different types of cards:

1. **SWAY B2C Card:** This card is used to describe sales goals when there are large numbers of small customers being targeted. For example; Today Jeff will sell $1,000 or Today Marina will call 50 customers.

2. **SWAY B2B CARD:** This card is used to describe sales goals to named customers. For example; Evan will sell training for $10,000 to Google.

3. **SWAY IMPROVEMENT CARD:** This card is used include Improvement tasks in the Sprint goals. For example; John will interview 10 customers [optional] to improve conversion by 5%.

12. **Contributors**

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