The story file

Step 2 from the CA Craft Beer Summit talk, November 11. Keep it beside your own PowerPoint template, with your colors and your layouts. The template sets how the deck looks; this file sets what it says, so the deck comes out the same every month and nobody has to relearn the report.

How to use it: fill in the blanks. The lines in italics are Coastline's monthly sales review from the talk. Delete them when yours is done.

Who it's for

- **The main version:** _____ *The sales team, at the monthly review.*
- **The short version:** _____ *Leadership, the same month cut to three slides: the headline and four numbers, what's behind it, and where the team goes next.*
- **Any other version:** _____ *A distributor's version, with the same data for a different audience.*

What each section answers

The sections that are there every month:

1. _____ *(Coastline: the month against goal)*
2. _____ *(what worked, with a win from every rep)*
3. _____ *(each rep against their own goal)*
4. _____ *(the initiatives, each against the accounts outside it since it started)*
5. _____ *(next month's focus)*

The sections it picks: _____ *It picks three from: by distributor, by brand, both sections, chains against independents, regulars gone quiet, a new-account story. Each picked slide says why it was picked.*

The last slide, the parking lot: _____ *Ideas it found that we haven't dug into yet. In the last few minutes of the meeting: are these worth following up on, and does anyone know something that explains them? What the team says goes back into the context file.*

What it builds from

- **The numbers:** _____ *The weekly review from step 1: the numbers it already built and tied out. No new math, only the story.*
- **A guide to the fields:** _____ *How to use each field in the review: which column is the goal, which is the actual, what counts as a win.*

The words

- **Words we use:** _____
- **Words we never want to see:** _____ *For a start: "this isn't just X, it's Y," "here's the thing," "delve," and a stack of dashes.*
- **How numbers are written:** _____

Lock in what works

This is habit 3: lock in what works.

- **What stays the same every month:** _____ *The five sections above, in that order, on our template.*
- **Asking what it would change:** _____ *Once it has run a few cycles and we've told it how things landed, we ask what it would change. It recommends. We decide.*

What it can't claim

- *A chart shows what changed alongside a push. It isn't proof the push caused it, so the slide says so.*

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