Design Document

SellXL™

SELLING AT THE EXECUTIVE LEVEL

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Selling at the Executive Level

Two Day Workshop for the Sales Professional
Activity and Case Study Oriented
Design Document

Selling at the Executive Level is a two-day, fast-paced interactive workshop that focuses on helping professional salespeople create, maintain and leverage relationships at executive levels in client organizations.

Learning is supported by a compelling business case about a global manufacturer (JKEA International), how its market positioning is driving new corporate initiatives and the competing agendas behind the scenes. Participants study and review the case study as part of the pre-course assignment and then apply activities against the case study during the workshop.

Study and review of the case study are both instrumental to the success of the workshop. One of the reasons that the workshop is able to be delivered effectively is that all the participants are “on the same page” with respect to their knowledge and understanding of the case. Robust discussions about the case take place throughout the workshop.

An integral part of the workshop’s success is the credibility of the facilitator. Each SellXL workshop is delivered by an experienced facilitator with significant business-to-business sales experience. The workshop requires facilitators to apply their expertise throughout the day. Inevitably, sales issues not covered by the workshop content arise and each facilitator must rely on his or her sales or sales management experience to address those key issues. As a result, the workshop is very facilitator dependent and, for that reason, SellXL facilitators are carefully selected, trained and certified to ensure their ability to address questions and problems that arise throughout the day.

The concepts and models used in SellXL are, in part, based on the results of interviews and surveys with CXO-level executives to learn what it takes for salespeople to stand out from a sea of look-alike competitors. The developer of the SellXL workshop has participated in original research over the past eight years (including 2003) with the assistance of Hewlett-Packard Company, the Kenan Flagler Business School of the University of North Carolina and the Center for Business and Industrial Marketing at Georgia State University.

Learning Objectives of the Workshop

At the end of the workshop, participants will be able to…

- Select the relevant executive to call on for the sales opportunity
- Develop the best approach to use to make their initial call on the executive
- Determine how to become perceived as a *trusted advisor* to the executive, thereby securing return access
- Describe and communicate their value to the executive on an on-going basis, using the client's metrics

Pre-Workshop Assignment

- Study and review of the JKEA International Case Study
- Pass a Knowledge Check to confirm knowledge of the case (*in development*)

SellXL Workshop Modules

The workshop is comprised of the following modules:

- Introduction – Why Call on Executives?
- Target the Right Executive
- How to Gain Access
- Establish Your Credibility
- Create Your Value
- Summary and Close

Introduction Module – Why Call on Executives?

The workshop begins with a reinforcement of why salespeople need to call at the executive level and the difference between the immediate sale of products and/or services and the need to build lasting relationships with client executives.

Participants learn how to describe the four stages of sales proficiency from the client executive's point of view, as well as understand the challenges associated with calling on senior-level client executives. The four stages of sales proficiency are also mapped to the four levels of business relationship that can exist with the client organization.

Participants are also reminded that they should develop answers to three compelling questions at multiple times during a sales campaign; namely,

- **Is there an opportunity we should pursue?** Is there a project or initiative that is driven by the client's breakthrough initiative? Is there significant payback associated with that initiative or are there significant consequences to the client if no action is taken? Why does the client or prospect need to take action?

- **Can we effectively compete for this opportunity?** Do we have a solution that provides specific business value to the client? Does the client think that we have some level of business value that differentiates us from our competitors?

- **Can we reasonably expect to win this opportunity?** Does the most powerful person in the client organization (that impacts or is impacted by this buying decision) want us to win? What has that person done to demonstrate that level of commitment to us?

It is the answer to this last compelling question that is the focus of the SellXL workshop.

The teaching methodology for the *Introduction* module is interactive lecture combined with PowerPoint visuals. Groups are organized in table teams at the beginning of the workshop to facilitate robust discussions of the case study, as well as individual and table team activities that are conducted throughout the day.

Target the Right Executive Module

This module addresses the need to identify the ***relevant*** executive for the sales opportunity at the beginning of a sales campaign. In the context of the SellXL workshop, the ***relevant*** executive is identified as the executive in the client organization who stands to gain the most if the project succeeds and to lose the most if the project fails.

This is accomplished immediately by discussing the concept of the ***relevant*** executive in the context of the JKEA International case study. Participants are then able to transfer that thought process to their active sales opportunities.

The case study was written around a sales opportunity at a fictitious company (JKEA International) and was developed in such a fashion that professional salespeople, regardless of their industry or the types of products or services they sell, could relate to it. It's all about understanding the client and identifying the relevant executives in the client organization who are impacted by the buying decision.

By the end of this module, participants are able to…

- Select the relevant executive to call on for the sales opportunity
- Discuss the concepts of formal and informal influence and power, as they relate to the client organization

The teaching methodologies for this module are lecture, interactive discussion and activities which support the application of the process to the case study and individual sales campaigns.

How to Gain Access Module

This module outlines four approaches to consider for gaining access to senior executives; namely:

- Overt approach via the telephone or using a phone call preceded by a letter
- Using a credible sponsor within the client organization
- Using a referral (someone who knows the executive, but who is not employed by the client organization). This could be a consultant, peer or friend
- Using the gatekeeper as a resource (AA, secretary or the like) to help secure access

Participants learn about the significance of achieving direct or indirect access to executives and a specific plan is devised to contact the relevant executive at JKEA International in an expanded 'Telephone Approach' Activity. In this table team activity, participants develop a script to schedule a meeting with a key executive at JKEA.

Participants also discuss roadblocks that may be put in place by executives in client organizations to avoid meeting with salespeople and what the salesperson can do to address specific roadblocks. Understanding why roadblocks exist are discussed, along with two key questions that salespeople have to address before considering circumventing a roadblock. Those questions are:

- What are the risks associated with attempting to gain access to the relevant executive by circumventing the roadblock?
- What are the risks (both short- and long-term) of not getting to the relevant executive at this point in the sales campaign?

By the end of this module, participants are able to…

- Develop the best approach to use to make an initial call on a relevant executive
- Develop a plan to get to that executive
- Describe the potential roadblocks that may inhibit their access to the relevant executive and how to circumvent them

The teaching methodologies for this module are lecture, interactive discussion and activities which support the application of the process to the case study and individual sales campaigns.

Establish Your Credibility Module

In this module, participants learn that credibility is the intersection of integrity and capability. They learn that they need to demonstrate both capability at the business level and integrity at the personal level to operate in the client's value zone and become perceived as a ***trusted advisor*** to the executive.

Participants perform an activity that confirms the fact that they are, indeed, viewed as a trusted advisor by their client executives. The individual activity has participants discussing the types of things that client executives have done to them or for them to demonstrate that the client executive views them in that light.

Participants learn that they need to develop an understanding of the client's business at three levels of learning; namely, the client's industry, the client's company and the client executive. They learn that, by doing their homework on the client in that manner, they will have gained a thorough understanding of the client's business environment.

Participants are introduced to the comprehensive ***Guide to Internet Resources***, which helps salespeople navigate through the client research process, enabling them to efficiently and effectively identify the key executive and business issues in a concise fashion.

Participants also learn how to plan and execute an initial face-to-face call on a client executive. They learn the four phases of the initial call and immediately practice developing a call on a client executive at JKEA International.

Significant content in this module focuses on developing questions to prepare for that initial face-to-face call on a key client executive and a second "questioning" activity that has participants identifying which questions they would pose to an executive, versus the questions they should have researched and developed answers prior to the call. Participants discuss the questions in a table-group activity and then develop a consensus regarding which questions to pose to the executive.

By the end of this module, participants are able to…

- Use a variety of tools to research their clients at three levels of learning
- Establish credibility at the executive level
- Determine how to become perceived as a ***trusted advisor*** to the executive, thereby securing return access

The teaching methodologies for this module are lecture, interactive discussion and activities which support the application of the process to the case study and individual sales campaigns.

Create Your Value Module

The module begins with a discussion of the four levels of business relationship that typically exist between a salesperson and the client's organization.

The module then focuses on the creation of a meaningful value proposition, which client executives have told us is an essential ingredient in developing a lasting relationship with the client's organization.

Participants are given a template and the process for creating an effective value proposition. They immediately practice creating a value proposition, using metrics associated with the JKEA International case study.

Participants are then reminded of the executive's willingness to meet with them after the installation of their solution to discuss the implementation issues, as well as the specific value the salesperson has either created or delivered to their organization. On-going approaches to communicating value to the executive – for example - An Annual Review Process is also discussed.

By the end of this module, participants are able to…

- Discuss the four levels of business relationship
- Construct an effective value proposition, using the client's metrics
- Describe how they will continually communicate their value to client executives, on an on-going basis

The teaching methodologies for this module are lecture, interactive discussion and activities which support the application of the process to the case study and individual sales campaigns.

Summary and Close – Day 1 of the Workshop

In this module, the progress made on the JKEA International case study is summarized and compared to the sales campaigns of the participants. Key concepts delivered during the day are discussed, as well as the criteria executives use to determine whether to grant salespeople return access to them.

Participants are reminded how salespeople are viewed by executives and what it takes to be perceived as a trusted advisor by them.

Additional Information

- Each module contains multiple activities that are focused on immediately applying the concepts learned to the JKEA International case study
- In addition, there are optional end-of-module activities (for each module) that focus on the current sales opportunities of the participants
- Participants also leave the workshop with a comprehensive ***Guide to Internet Resources***, which facilitates their ability to navigate the Internet to obtain pertinent information about their individual clients

Day 2 of the Workshop

Day 2 of the workshop focuses the activities accomplished in Day 1 on the live, current sales opportunities of the participants.

The specific purpose of this session is to apply each of the activities in the SellXL workshop directly to the active sales opportunities of the participants. The supporting material contains the activities, multiple copies of the corresponding worksheets and targeted pages from the SellXL participant workbook that precede each of the activities.

Day 2 of the SellXL workshop can also be conducted again, at a point 90-180 days following the delivery of the original workshop or at any time the sales manager deems a reinforcement of the SellXL concepts is desirable or necessary.

An optimal evening activity for Day 1 of the workshop is the activity designed to help salespeople use the Internet to research their client. That activity would then be de-briefed at the beginning of Day 2.

Additional Option for Day 2 of a SellXL Workshop – Role Play Oriented

Additional optional materials have been created for Day 2 of the SellXL workshop that includes telephone and face-to-face role plays, using templates that were introduced and applied in the "standard" Day 1 of the workshop. The role plays can easily be customized to accommodate specific and realistic client experiences.

Participants engage in a series of scenarios that include use of the telephone to schedule an appointment with a C-Level executive, followed by the execution of a face-to-face call on the same executive, using similar background information. This enables the participants to focus on executing the role plays, rather than studying them for intimate background details.

In each scenario, the salesperson actually executing the role play is given time to read and review the situation and develop a strategy for the role play, seeking advice from other salespeople in the group, just as they would in a team environment. The C-Level executive leaves the room during that time and plans the execution of their own role. The role play is then executed and debriefed, using the observation worksheets that align with templates that were distributed during Day 1 of the SellXL workshop.

Small breakout groups (of four to eight participants) are suggested and managers and other subject matter experts can play the role of the C-Level executive (in addition to the workshop facilitator).

To accomplish that objective, a SellXL *Guide to the Role Plays* is made available, containing detailed instructions for facilitating the role plays for both the salesperson and C-Level executive roles. Worksheets for the person playing the C-Level executive role are also included in the *Guide*, for use in taking notes during the role plays and the subsequent debriefing that takes place.

The materials for conducting role plays on Day 2 of the SellXL workshop can be used in conjunction with or to replace SellXL reinforcement materials that are also available…now there are simply more options, depending on the client's needs and requirements.

Measuring the Stage of Sales Proficiency

In the *Introduction* module of SellXL, a model related to the Four Stages of Sales Proficiency, ranging from *commodity supplier* to *trusted advisor* is introduced. The SellXL workshop optionally provides an attempt to measure the current stage of each salesperson's proficiency, in an anonymous and confidential manner.

At the client's request, participants are given an instrument with ten scenarios and four ways to respond to each scenario – corresponding to the four stages of sales proficiency. After responding to the scenarios, participants score the test using an instrument that correlates their answers to the four stages of proficiency.

The score sheets, without participant names, are passed back to the facilitator who creates an average stage of sales proficiency for the group.

Testing – A Level 2 Approach to Evaluation

A Level 2 approach to evaluation is achieved by the use of SellXL Pre- and Post-Test instruments that are made available to clients at no charge. Obviously, this process is only implemented when the client's culture supports the use of testing as a way of evaluating the learning that has taken place in a workshop.

In that case, the SellXL Pre-Test could be administered on-line in advance of the workshop or at the start of the workshop itself. A similar test, perhaps with the questions re-sequenced, is also administered at the end of first day of the workshop to provide information about the learning that has taken place in the workshop.

Optional Activity (When Participants Return to Their Office)

An optional activity has been included in the workshop design which has the participants research their client or prospect on the Internet, using the ***Guide to Internet Resources.*** A comprehensive set of questions is included on the last two pages in the handout to guide participants through the activity. This activity would be de-briefed in the client's office (by the participant's sales manager or executive) or in a follow-on SellXL Reinforcement session.