Helping Clients Succeed—Opportunity Qualification:
Co-Developing a Value Proposition

OVERVIEW

There are a lot of questions you need to answer before you can help a client succeed. Getting those answers, or even knowing what to ask in the first place, can be challenging. The *Helping Clients Succeed* sales training work session outlined below will teach you what to ask, when, and how so you can get the critical information you need, including:

- What are the client's key needs and real issues?
- Who are the decision-makers and what is their process and criteria?
- How do I appropriately discuss pricing and budget early in the sales cycle?

This 2-Day program covers the "Opportunity Qualification" phase of the sales cycle and is specifically designed for professionals who have business development and sales responsibilities. *Helping Clients Succeed* not only delivers concepts that give a strong theoretical foundation for sales and consulting, it provides the critical thinking (IQ), communication/relationship skills (EQ), and sales process skills (XQ) required to do it in real life.

CORE LEARNING OBJECTIVES

- Co-develop compelling value propositions or quickly decide that one does not exist so that go/no-go decisions can be made more effectively.
- Create value by helping clients think through the business impact of key issues and drivers.
- Use emotional intelligence skills to engage with clients in a way that opens up dialog and brings out more insightful information about their business.
- Uncover and deal with constraints that may prohibit success.
- Diplomatically discuss the critical resource issues of time, people, and especially money.
- Understand the client's decision making process, players, and criteria.
- Gain insight into how your attitudes and behaviors effect the development of trust in the client relationship.

WHO SHOULD ATTEND

This work session is specifically designed for individuals involved in complex and consultative sales, such as sales leaders, sales professionals, professional services consultants, implementation and delivery professionals, and executives.

SPECIFIC LEARNING OBJECTIVES

DAY ONE

Foundational Principles

Good business development dialogue is a balance between inquiry and advocacy. It requires exceptional critical thinking and communication skills. The better job we do of inquiry the more powerfully we can advocate. The Foundational Principles of the course help build the core competencies of asking effective questions to understand a client’s needs.

Specifically, the Foundational Principles help the participant:

- Learn how intent affects the trust between client and consultant and align their own intent to build trust and rapport with clients.
- Learn the three modes (active, receptive, observant) of client-consultant interaction and how to move fluently between the three modes.

O—The Opportunity

You can’t help someone succeed who has no perceived need. Consultants learn how to collaborate with clients to develop a compelling business case around a particular solution, or to agree that a strong business case doesn’t exist. This analysis permits both consultant and client to allocate resources to high probability situations and exit gracefully from low probability activities. Consultants will learn to avoid premature discussion of solutions, and move instead to exploring the underlying business problems the solution is intended to solve and / or the desired results the solution is intended to produce. Problems and results can be examined for evidence; evidence can be developed into economic consequences and impact, thus creating a sound business case for adopting a solution.

Specifically, participants will learn skills in O that enable them to achieve the following:

- Not talk about solutions before understanding what the client is trying to accomplish.
- Bring out all of a client's relevant issues, and identify the highest leverage issues that impact their business.
- Discuss client issues in depth, in order of their importance.
- Help clients find or think through the information that proves the problem exists.
- Get a clear measurement of how results will be achieved and estimate the financial impact of not solving a problem.
- Build a strong business case for recommendations.
- Think beyond the immediate impact of the proposed intervention by exploring who or what else in the company would be affected and how proposed solutions are tied to overall key initiatives and strategies.
- Explore what has prevented a successful solution in the past or what might prevent one in the future.

DAY TWO

O—The Opportunity continued

See Day One.

R—The Resources

You can't help someone succeed with insufficient resources. Consultants will learn how to qualify an opportunity in terms of time, money, and people. A distinction is made between price justification ("Are we getting the best price?") and value justification ("Is this solution worth the investment?") Particular emphasis is given to establishing a realistic expectation on the part of the client on what is required financially to solve the problem or achieve the desired results. Consultants will role-play predictable client responses to the question, "Have you established a budget for this project?"

Participants will learn skills to enable them to:

- Discuss a reasonable budget for a solution before the final solution is proposed.
- Diplomatically challenge client's beliefs regarding resources (time, people, money, etc.) that don't appear realistic.

D—The Decision Process

Since often the criteria for making the decision are tacit and implicit, consultants will learn how to make them conscious and explicit. Once consultants learn whom they must see, they learn how to get access to those they must see to develop a compelling rationale that is in the client's best interest. Consultants will also learn advanced questioning techniques that keep the focus on the issues and not on the solution, how to deal with tough questions from the client, and how to answer the real question or concern.

The skills taught in the D part of ORDER will enable the participant to:

- Think through every step that a client's organization must take to make a well-informed decision.
- Establish a realistic timetable for each decision step, including the final decision.
- Gain access to speak with each person who may influence the decision before preparing a solution.

Review & Drill

Critical concepts and skills will be reviewed throughout the two-day time frame. Live role play and discussion around actual working accounts will reinforce the understanding and adoption of these concepts and skills.

