Design Document

Cultivating Client Loyalty

THROUGH EXECUTIVE SELLING

CCL®
Cultivating Client Loyalty…through Executive Selling

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

Cultivating Client Loyalty (CCL) is a one-day, fast-paced interactive workshop that focuses on helping professional salespeople develop an understanding of the impact of client loyalty and then to create loyalty-based relationships at executive levels in client organizations.

Learning is supported by a compelling business case about a global manufacturer, *RTC Technologies*, and how the lack of cultivating client loyalty could result in losing future sales opportunities to a number of competitors, as well as the more important loss of a long-term client relationship. 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 instrumental to the success of the workshop. One of the reasons that the workshop is capable of being delivered in one day 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 CCL 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, CCL facilitators are carefully selected, trained and certified to ensure their ability to address questions and problems that arise throughout the day.

Learning Objectives of the Workshop

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

- Select the right executives in the client organization to focus on to build loyalty-based relationships
- Use perceptive questioning techniques to uncover where your company’s solutions can deliver the most value

- Utilize tools like the *Executive Call Plan* and the *Executive Presentation Guide* to optimize loyalty-based relationships
- Describe and communicate value to executives in the client organization on a consistent basis, so as to cultivate loyal relationships

Pre-Workshop Assignment

- Study and review of the *RTC Technologies* Case Study
- Pass a Knowledge Check to confirm knowledge of the case study

CCL Workshop Modules

The workshop is comprised of the following modules:

- Importance of Client Loyalty
- Planning an Initial Call on the Executive
- Communicating Your Value
- Presenting to Executives
- Becoming a Trusted Advisor
- Summary and Close

Introduction Module – Importance of Client Loyalty

The workshop begins with an overview of why salespeople need to cultivate loyalty at the executive level in client organizations and the difference between the immediate sale of products and/or services and the need to build lasting, loyal relationships with client executives. Salespeople learn the impact of client loyalty over the long-term but are also shown that client loyalty can have short-term implications as well.

Participants are introduced to the Loyalty Staircase and the steps to cultivating client loyalty that can lead to developing and maintaining productive relationships at the executive level.

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.

Case Study Introduction

The purpose of the case study is not to provide a specific client or industry perspective, but to enable the participants to develop an understanding of the concepts and models presented and developed within the CCL workshop. By utilizing a realistic and viable case study that can be quickly and easily understood by a broad cross-section of salespeople, whether they are selling products and/or services, participants are immediately able to apply the concepts of the workshop and to then transfer that thought process to their active client engagements and sales opportunities.

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

- Evaluate the current relationships with the key executives at *RTC Technologies*, as well as their specific business issues
- Discuss previous actions that could have been taken to cultivate loyalty with those executives
- Formulate preliminary decisions regarding whether or not to cultivate client loyalty, moving forward

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

Planning the Initial Executive Call Module

This module stresses the importance of planning that critical initial face-to-face call on a client executive. The old adage that *there is never a second chance to make a first good impression* applies here. Executives expect salespeople to be totally prepared for this initial call with them and for the salesperson to have done some homework on the client organization.

In this module, participants have the opportunity to use the *CCL Executive Call Plan* template in preparing a call on a key executive at *RTC Technologies*. As a result of that activity, they will clearly see the value of using that template in planning key client calls for current sales opportunities.

Participants are also introduced to the value of conducting research on the client's company prior to that critical initial meeting with an executive. They are given a compendium of sites to use to research the client's company – *CCL Internet Resource Guide* – all with the thought of minimizing efforts to achieve maximum results. Participants also have a chance to apply strategic questioning techniques to uncover where their company's solutions can deliver the most value to the executive.

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…

- Explain the importance of research and preparation prior to an initial call on an executive – and connect these issues to client loyalty
- Apply perceptive questioning techniques to help uncover where your company's solutions can deliver the most value
- Utilize the *Executive Call Plan* to prepare for a critical initial call on a key client executive

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.

Communicating Your Value Module

The module begins with the creation of a *Value Matrix* – a unique matrix that cross references the salesperson's solutions against the client's key business initiatives and clearly enables the salesperson to highlight differentiated value – contrasted with that of competitors.

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 developing a value proposition, using the *RTC Technologies* case study as a basis for the activity.

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 – A Formal Value Review Process is also discussed.

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

- Craft a *Value Matrix* that provides a preliminary view of the value you can deliver
- Construct a detailed *Value Proposition* – which can only be accomplished after an in-depth review of your value contrasted against the client's key business initiatives
- Develop a plan to conduct *Formal Value Reviews* of the value you continue to deliver to the client, while addressing multiple client initiatives

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.

Presenting to Executives Module

In this module, participants are introduced to a process of gathering key information about the *relevant* executive for the project or application, associated with the sales opportunity. That *relevant* executive is then viewed as the key focal point for the executive presentation. As part of that process, they are introduced to a template called the *Executive Presentation Guide* – which will also be used as a repository of information to help prepare the executive presentation. The *Guide* is used to make certain that all aspects of the presentation have been considered, including the actions we expect the executive to take as a result of the presentation.

A key aspect of this module is a *Checklist for Presenting Your Solution to the Executive*. This checklist reviews items that should be accomplished with both the sales team and the client team, before – during – and after – the executive presentation itself.

Participants then get to practice preparing an outline of an executive presentation that would be given to the relevant executive at *RTC Technologies* – using the *Executive Presentation Guide* template. They are then able to transfer that thought process to their active client engagements and sales opportunities.

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

- Assemble information about the *relevant* executive to assist you and your team in developing a value-focused presentation of your solution
- Plan an executive presentation – using the *Executive Presentation Guide* template – based on *RTC Technologies*

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.

Becoming a Trusted Advisor 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.

Participants learn that cultivating client loyalty can help the salesperson develop and reach higher levels of business relationship with key client executives. Another critical learning for this module is the time (and resources) it takes to achieve those higher levels of business relationship. From that perspective, salespeople must make informed decisions regarding the specific client executives that they will target to make that investment.

Traits demonstrated to client executives by trusted advisors are reviewed, as well as the fact that achieving a trusted advisor relationship with a client executive is the true pinnacle of achievement.

A key activity in this module focuses on understanding where the salesperson is with respect to the level of business relationship with certain client executives. Many salespeople believe that they have a trusted advisor relationship with a key executive in the client organization. The activity focuses on having the participant describe specifically what the client executive has done to or for the salesperson to demonstrate that a trusted advisor relationship exists. Table group discussions then take place to confirm that the salesperson has achieved that level of relationship.

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

- Discuss the four levels of business relationship
- Describe the implications of developing a trusted advisor relationship with key executives in the client organization
- Make informed decisions about which clients to select to focus on and develop that type of relationship

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

In this module, the progress made on the *RTC Technologies* 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 focus on the need to cultivate client loyalty to ensure lasting client relationships.

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 *RTC Technologies* case study
- In addition, there are optional module activities (in each module) that focus on the current sales opportunities of the participants
- Participants also leave the workshop with a comprehensive *Internet Resource Guide*, which facilitates their ability to navigate the Internet to obtain pertinent information about their individual clients

CCL Reinforcement Day

An optional CCL Reinforcement Day, complete with materials, has been developed to support and extend the one-day CCL workshop.

The specific purpose of the reinforcement session is to apply each of the activities in the CCL 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 CCL participant workbook that precede each of the activities.

The Reinforcement Day can be conducted as Day 2 of the CCL workshop, be conducted 90-180 days following the workshop or at any time the sales manager deems a reinforcement of the CCL concepts is desirable or necessary.

If the Reinforcement session is conducted as Day 2 of the workshop, an optional evening activity for Day 1 would be 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 Reinforcing the CCL Process

An additional option has been created for reinforcing the CCL process. In this option, a series of four weekly telephone conference calls of 60-90 minutes in duration are hosted either by a CCL consultant or by the client's sales manager. A complete Leader Guide with suggested topics to cover on each call, as well as detailed email communication messages that include a number of questions that the salesperson should use to prepare for each of the four calls, has also been created.

Documented evidence is available that shows that improving the effectiveness of a salesperson requires both embracing a sales methodology and consistently applying and practicing the principles. The CCL Reinforcement Process is aimed at accelerating the infusion of that methodology into the client's organization.

Measuring the Stage of Sales Proficiency

In the *Introduction* module of CCL, a model related to the Four Stages of Sales Proficiency, ranging from *commodity supplier* to *trusted advisor* is introduced. The CCL 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.

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

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 *Internet Resource Guide.* 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 CCL Reinforcement session.