

# Pre-Workshop Planning Guide



Learning Solutions International

[www.SellXL.com](http://www.SellXL.com)

## Pre-Workshop Planning Guide

### Purpose of this Guide

The purpose of this Pre-Workshop Planning Guide is to provide you with a clear set of steps to take to help make the Selling at the Executive Level (SellXL) workshop a success in your organization.

It is critical that the preparations outlined in this Guide be implemented as outlined. Since the SellXL workshop uses a comprehensive case study as the basis for workshop activities, it is particularly important that each participant receives access to the case study in the timeframes indicated.

Thanks for your help in making the SellXL workshop a success and give us a call at Learning Solutions International if you have any questions.

## Pre-Workshop Planning Guide

### Overview

#### Step 1: Book Workshop Meeting Room

30–45 days before the workshop

- Reserve a facility for the workshop as soon as possible. See the guidelines summarized in this document. A separate private room for lunch should also be reserved, in addition to the meeting room.
- Give a copy of this Guide to the person responsible for setting up the meeting and luncheon rooms.

#### Step 2: Distribute Workshop Announcements to Participants

30 days before the workshop

- Send a Workshop Announcement and access to the JKEA International Case Study to each workshop participant from their immediate manager. A sample Workshop Announcement is contained in this document.
- Confirm receipt of the Case Study and attendance at the workshop with each participant.

Note: Remind the participants' managers of the following: (1) Need for each participant to complete the Case Study review and (2) the specific workshop date(s).

#### Step 3: Communicate with the Workshop Participants

10 days before the workshop

- Send an email or voicemail reminding each participant to complete the pre-work assignment (JKEA International Case Study).
- Confirm the meeting room and audio-visual requirements.

#### Step 4: Final Facility Preparation

Evening before the workshop

- The meeting room should be set up according to the requirements diagram shown in this Guide.
- Confirm that the workshop materials have arrived at least 24 hours in advance of the workshop.
- Workshop materials and access to the meeting room should be made available to the SellXL workshop consultant.

## Pre-Workshop Planning Guide

### Meeting Room Setup Requirements

#### SellXL One-Day Agenda

START	END	ACTIVITY
7:00 a.m.		Room open for workshop consultant
7:15	8:00	Coffee and continental breakfast available
8:00	10:00	SellXL Workshop in session
10:00	10:15	Morning break
10:15	11:45	SellXL Workshop in session
11:45	12:45	Lunch
12:45	3:00	SellXL Workshop in session
3:00	3:15	Afternoon break
3:15	6:00	SellXL Workshop in session

#### Catering Suggestions

MEAL	TIMING	SERVING SUGGESTIONS
<b>Continental Breakfast</b>	Set up by 7:15 a.m.	<ul style="list-style-type: none"> <li>• Coffee (regular and decaf); tea</li> <li>• Variety of juices and sodas</li> <li>• Assorted muffins, bagels and fruit</li> </ul>
<b>Breaks</b>	Morning setup for 9:45 a.m. Afternoon setup for 2:45 p.m.	<ul style="list-style-type: none"> <li>• Coffee (regular and decaf), juice and sodas</li> </ul>
<b>Lunch</b>	Set up by 11:30 a.m. for 11:45–12:45 lunch	<ul style="list-style-type: none"> <li>• Separate room</li> <li>• Buffet is preferred</li> </ul>

#### On-Site Facility Support

The following support should be available to the workshop consultant the day of the workshop:

- A secure location for workshop materials. Several days before the workshop, you will receive workshop materials. Place the boxes in a secure location until the evening before the workshop.
- The meeting room is set according to the meeting room diagram specifications contained in this document. Assign facility staff to the meeting room to review the room set-up with the workshop consultant and make any changes that are necessary.
- A Message Center is available where participants can receive messages during breaks.
- Power cords and power strips at each table for personal computer hook-up.
- Meeting room capable of being locked during lunch.

## Pre-Workshop Planning Guide

### Meeting Room Setup Requirements

#### Audio-Visual Requirements

##### LCD Projector

- Provide an LCD projector (direct projection type) that can interface with an IBM compatible personal computer.
- Provide all required cables and assure that the LCD projector is operational. (Please make certain that the organization supplying the LCD projector has backup plans available, in case of projector failure).
- Make the above equipment available no later than 7:00 pm the night before the workshop. If overnight security of the equipment is an issue, then the equipment must be in place and operable no later than 7:00 am on the day of the workshop.
- Assure break, lunch and overnight security for this equipment.
- Provide a large screen for the LCD projector.
- Place the LCD projector on a standard 3' x 6' table.

##### Flip Chart Stands

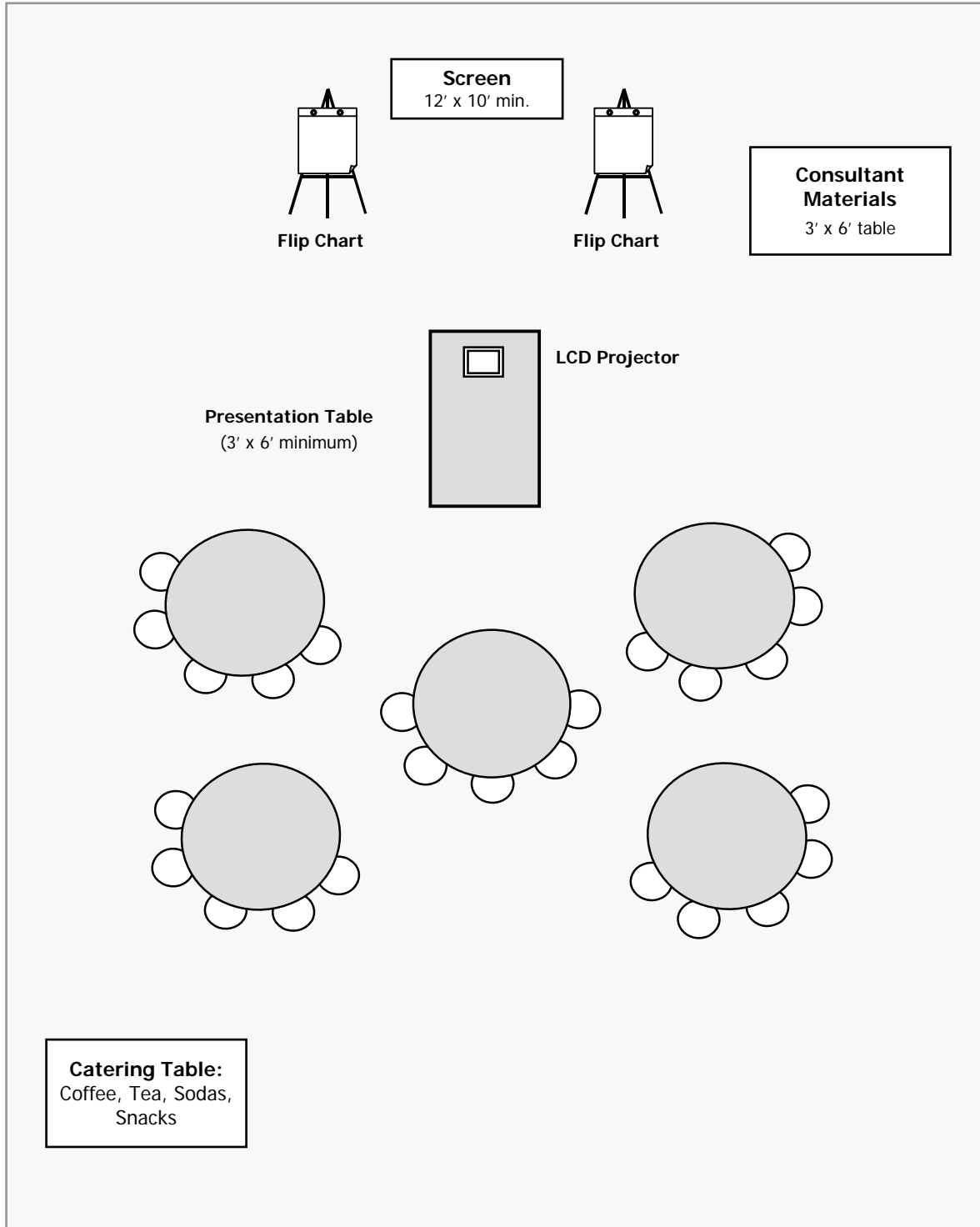
- Provide two flip chart stands and pads
- Markers, in a variety of colors, with each flip chart
- Masking tape with each chart stand

##### Workshop Room Requirements

- The workshop meeting room must have sufficient space to comfortably accommodate the participants.
- Carefully review the **SellXL Workshop Set-Up** diagram on the next page for exact specifications. Please do not seat more than five people per round table. These “half-rounds” will facilitate each participant’s view of the screen in the front of the room.
- The workshop consultant must be able to post flip charts on the meeting room walls.
- Place a six-foot table at the front of the room to accommodate the LCD projector. Place the coffee table at the rear of or outside the meeting room.
- Provide tablecloths, water pitchers and glasses on each table.

## Pre-Workshop Planning Guide

### Meeting Room Setup Requirements



## Pre-Workshop Planning Guide

### Sample Announcement for Workshop Participants

**DATE:** *[Today's Date]*  
**TO:** *[Individual Participant]*  
**FROM:** *[Sales Manager]*  
**SUBJECT:** *[Selling at the Executive Level (SellXL™)]*

I am looking forward to your active participation in the *SellXL* workshop to be held ***[time, date and location]***. The workshop is intensive and fast-paced and will focus on ways to create, maintain and leverage relationships with senior executives in your client organizations.

The workshop is delivered by a senior sales consultant whose considerable experience will be used throughout the day.

Workshop modules include the following:

- Selecting the Right Executive
- How to Gain Access
- Establish Your Credibility
- Create Your Value

Many of the workshop activities are based on the JKEA International Case Study, which will enable all of us to work from a common base of information and knowledge. It is critical that you spend time in advance of the workshop studying, reviewing and answering the questions at the end of each phase of the JKEA case study. ***There will be no workshop time available for you to complete this work!***

***[Optional: Each participant should bring information with them to the workshop about a sales opportunity they are currently pursuing that requires a meeting with a client executive or a presentation to a senior executive. You should also complete the worksheet on page 8 of this Planning Guide, as it relates to that opportunity.]***

If you are traveling from out of town, you should arrive no later than ***[time/date]***. The workshop will begin promptly at ***[8:00 a.m.]*** and will conclude that same day at ***[6:00 p.m.]***. If you need to make phone calls or respond to emails, there will be two breaks and an hour for lunch during the day.

## Pre-Workshop Planning Guide Sales Opportunity Worksheet

SALESPERSON'S NAME	CLIENT

SALES OPPORTUNITY	EXPECTED REVENUE

Describe the client's application or project.

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What is the basis for your pursuit of this opportunity?

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Outline your solution that will enable you to effectively compete for this opportunity.

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Can you win this opportunity by calling on executives with whom you've already established a relationship? If NO, with whom else will you need to establish a relationship?

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Who is the relevant executive for this sales opportunity?

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How will you access that executive?

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