Prospecting to Executives

Design Document

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Prospecting to Executives

One Day Workshop for the Sales Professional
Activity and Role Play Oriented
Design Document

Prospecting to Executives is a one-day, fast-paced interactive workshop that focuses on helping professional salespeople gain access to key executives in prospect organizations.

Learning is supported by a variety of activities and role plays that support the workshop content.

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 role plays and activities. Robust discussions about each of the role plays take place during the workshop.

An integral part of the workshop's success is the credibility of the facilitator. Each 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, our workshop 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 the *Prospecting to Executives* workshop 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 this workshop has participated in this type of original research over the past ten years 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 are able to…

- Incorporate prospecting best practices into their daily activities
- Perform up to six “learn and do” activities and assess the viability of incorporating the techniques into their own prospecting environment
- Initiate effective research on key prospect executives so they are perceived as business-like during their initial phone conversations or face-to-face meetings
- Enhance their ability to gain access to key executives in most prospect organizations, by using approaches proven most effective

Prospecting to Executives **Workshop Modules**

The workshop is comprised of the following modules, which correspond to the six-step prospecting process outlined in the session:

- Plan and Organize Information Sources
- Identify Specific Companies and Industries to Target
- Conduct Research in Those Key Areas
- Make Initial and Follow Up Calls
- Conduct Executive Calls
- Establish Controls to Carefully Track Progress

Introduction Module – Why Call on Executives?

The workshop begins with a reinforcement of the challenges salespeople have in implementing consistent prospecting techniques, especially as it relates to attempting to contact and pursue prospect executives.

Participants then discuss the specific challenges associated with calling on executives and the ways to mitigate those challenges become the basis for the material presented in the workshop.

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

Plan and Organize Information Sources

This module addresses the need to develop a daily prospecting plan, as well as an overview of some key tools and techniques that can used to put a consistent prospecting plan in place.

Participants are introduced to the comprehensive ***Guide to Internet Resources***, which helps salespeople navigate through the research process, as it relates to prospects, enabling them to efficiently and effectively identify the key executive and business issues in a concise fashion. The *Guide* is used later in the workshop for a series of activities related to developing information about a key prospect currently being worked by the participant.

Also emphasized here is the importance of developing a good understanding of the executive's key business issues, before initiating a phone call or participating in a face-to-face meeting with the prospect executive.

The teaching methodology for this module is interactive discussion, facilitated with PowerPoint visuals, which support the application of the process to the individual prospecting campaigns of the participants.

Identify Specific Companies and Industries to Target

This module focuses on using the participant's current territory plan as the starting point for the development of a prospecting plan. However, it quickly takes it to the next level by challenging the participants to identify additional lead sources they can use to develop a robust list of prospects.

While *Typical Lead Sources* are discussed, the workshop drives home the point that each participant needs to develop their own sources of prospecting leads.

The teaching methodology for this module is interactive discussion, facilitated with PowerPoint visuals, which support the application of the process to the individual prospecting campaigns of the participants.

Conduct Research in Those Key Areas

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

The module features a number of key activities, including one that has the participants research their prospect on the Internet, using the ***Guide to Internet Resources,*** which was distributed earlier***.*** A comprehensive set of questions is included on the last two pages in the handout to guide participants through the Activity. This Activity is immediately de-briefed and the results are shared amongst the table teams.

An entire series of activities is contained within this module which allow the participants to get immediate hands-on experience with a variety of Internet tools that are designed to help them locate and develop prospects within their territories. In addition, participants are introduced to a variety of techniques that are designed to help them use creative techniques to locate and access prospect executives.

The teaching methodologies for this module are interactive discussion, facilitated with PowerPoint visuals, as well as a variety of table team activities, which support the application of the process to the individual prospecting campaigns of the participants.

Make Initial and Follow Up Calls

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

- Overt approach via the telephone or using a phone call preceded by an email or letter
- Using a credible sponsor within the prospect organization
- Using a referral (someone who knows the executive, but who is not employed by the prospect organization). This could be a consultant, business associate 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 a key prospect executive in an organization. A template for developing a script for the telephone approach to the executive is presented and discussed. Then, a ‘Telephone Approach’ Activity is conducted in each table team, using the template provided as the basis for the Activity. Here, participants develop a script to schedule a meeting with a key executive at that organization and the outcome of that Activity is rigorously tested and debriefed.

Participants also discuss roadblocks that may be put in place by executives in prospect 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 prospect executive by circumventing the roadblock?
- What are the risks (both short- and long-term) of not getting to the prospect executive at this point in the sales campaign?

During this module, the first role play is conducted at each table team. One person plays the role of an Account Manager (phoning a prospect executive) and one person plays the role of a C-Level executive. Others at the table serve as Observers and have a worksheet to complete as they observe the role play. The person playing the role of the Account Manager is expected to use the techniques just discussed in the workshop to secure an appointment with a prospect executive.

The results of the role play are immediately de-briefed and experiences amongst the various table teams are shared. Best practices are immediately identified and successes noted.

The teaching methodologies for this module are interactive discussion, facilitated with PowerPoint visuals, as well as a variety of table team activities and a telephone role play, which support the application of the process to the individual prospecting campaigns of the participants.

Conduct Executive Calls

In this module, participants learn how to plan and execute an initial face-to-face call on a prospect executive. They learn the four phases of the initial call and again, a template is provided to enable the participants to effectively execute a face-to-face call on a prospect executive.

They immediately practice developing a call on a prospect executive, using the second role play in the workshop.

Again, one person at each table plays the role of an Account Manager (calling on a prospect executive) and one person plays the role of a C-Level executive. Others at the table serve as Observers and have a worksheet to complete as they observe the role play. The person playing the role of the Account Manager is expected to use the techniques just discussed in the workshop and begin to develop a relationship with the prospect executive.

Again, the results of the role play are immediately de-briefed and experiences amongst the various table teams are shared. Best practices are immediately identified and successes noted.

The module concludes with a perspective of a continuum of the Questioning Approach to use with prospect executives.

The teaching methodologies for this module are interactive discussion, facilitated with PowerPoint visuals, as well as a variety of table team activities and a face-to-face role play, which support the application of the process to the individual prospecting campaigns of the participants.

Establish Controls to Carefully Track Progress

This module contains a series of activities designed to keep the participants on track with respect to implementing realistic controls within their own territories to monitor progress and results against goals.

One Activity has them planning a Sales Blitz for their territory by describing the event, as well as its purpose and objectives. Another Activity is focused on having the participants set their own prospecting goals for the next 90 days.

The teaching methodologies for this module are interactive discussion, facilitated with PowerPoint visuals, as well as a variety of table team activities, which support the application of the process to the individual prospecting campaigns of the participants.

Summary and Close – Prospecting to Executives Workshop

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 become 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 participant’s environment

- 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 prospects