

Success in a Virtual Environment

Bill Taylor
Senior Consultant & Executive Coach
bill.taylor@mentorgroup.co.uk
858.847.2721

mentor

© Mentor Group Ltd 2020

This series of virtual workshops has been created for those in sales and other customer facing functions to maximise your success and productivity whilst remote working.

Although many organisations have people and functions that are already operating in a virtual environment, the current global travel and rapid shift to home working for suppliers and clients, changes the dynamics and the need to align and develop our customer facing people on a scale which we have never experienced previously.

These modules will be delivered in groups of up to 12 and include:

1. 4 - 8 sessions per topic of up to 90 minutes per session
2. Our Mentor Group productivity App to distribute content, in event messaging, evaluation and optional accreditation for the program
3. A managed serviced for scheduling the events
4. Leader coaching to ensure sustainability
5. Interactive PDF of content and practical exercises

Furthermore, we build these sessions using the latest virtual techniques and structures to ensure the learning sticks to give you sustainable and outcome focused results.

If you would like further information, please contact your Mentor Group account manager or e-mail us at solutions@mentorgroup.co.uk

Workshops

Virtual Working

- Being ready for remote working
- Self-management when remote working
- Staying connected remotely
- High impact communication using video, voice and visuals

Virtual Selling

- Maximising key selling time
- Developing relationships at a distance
- Best practice uses of virtual technology in selling
- Managing the virtual sales process

Virtual Managing and Coaching

- Self-Management during remote working
- Best practice uses of virtual technology in managing remotely
- Different remote performance meetings and structure
- Managing and coaching performance at a distance

Social Selling

- Why are we using social selling?
- Creating engaging content
- Platforms to use
- Building a follower base
- Account based marketing

Storytelling

- Introduction to Storytelling in sales
- The story process and personal stories
- Bring stories to life with visuals
- Telling your organisational story
- Solution stories
- Stories to close business

Demand Generation

- Outcome based call planning
- Powerful call openings
- Telephone communication principles
- Handling objections
- Outcome based questions
- Selling early value

Account Planning

- How to research your customer to find sales opportunities
- Building a strategy map
- Mapping your contacts
- Developing an action plan that works
- Leading successful virtual customer meetings
- Leading your virtual team successfully
- Achieving results with the account plan review cycle

Managing Inside Sales Virtually

- Understanding the change process and supporting your people through it
- Communication and contact cadence strategies that maximise team engagement
- Structuring your day and that of your team to deliver maximum results
- How to manage your team's performance remotely

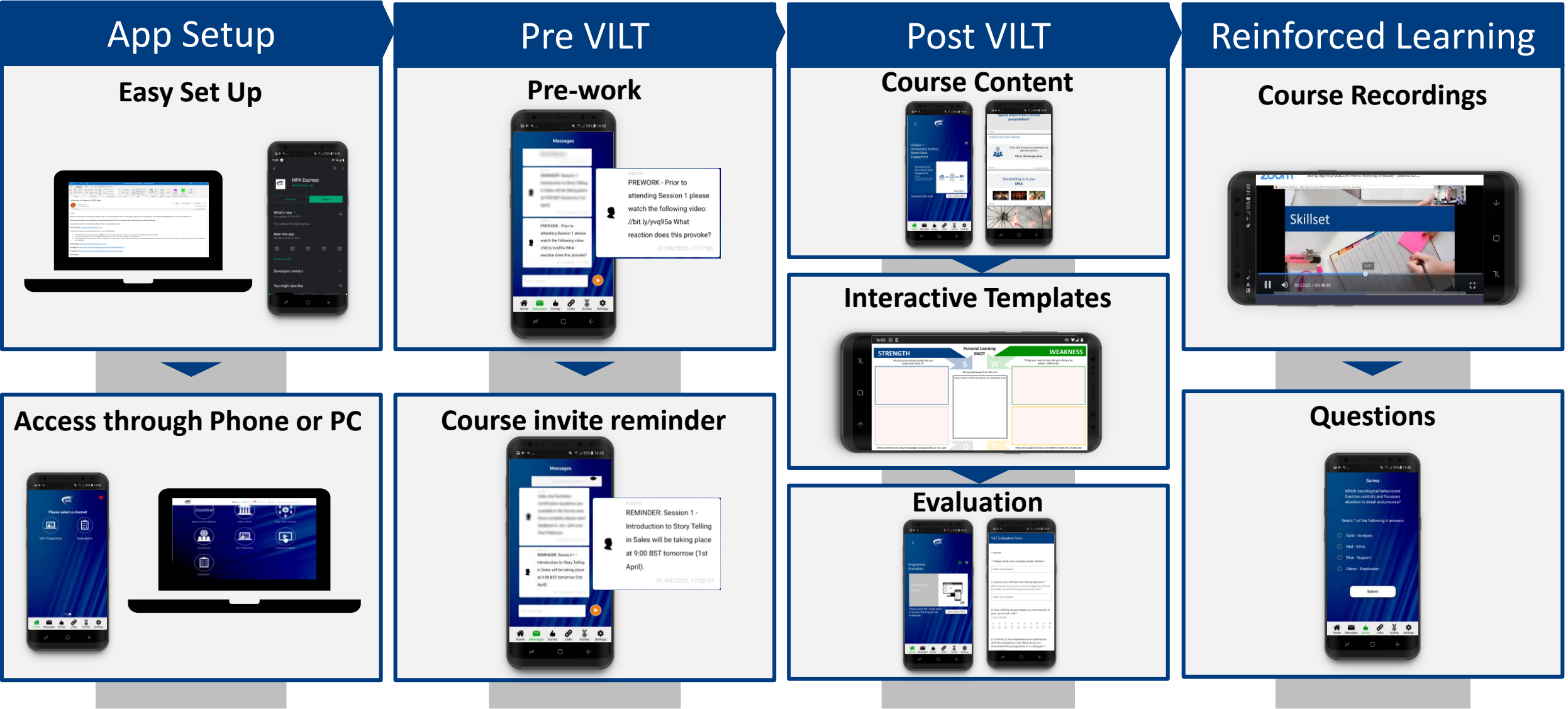
Value Selling in the "New Normal"

- Building a customer strategy map
- How to engage successfully with remote stakeholders
- Qualifying the new reality
- Articulating your solution and how it delivers value to the customer

Negotiating Remotely

- What is negotiation and how is it different to selling?
- The importance of setting negotiation outcomes and ranges
- The 5 stages of negotiation
- The vital differences between face to face and remote negotiation and what you must do about them
- How to trade value rather than price
- Handling push backs and closing the deal

VILT with App User Roadmap



Target Audience

All roles working at a remote location.

Business Issues

- Increasing working from home trends is resulting in less face to face time with colleagues resulting in a feeling of isolation
- Businesses are concerned about the productivity of remote workers sometimes causing issues in trust between staff and employers
- Lack of guidelines and information regarding remote working result in employees having to figure it out for themselves

Program Aim

To share best practice in remote working to drive employee productivity and wellbeing.

Program Content (4 X 90 minute learning objects)

1. Being ready for remote working

- Differences between remote and office working
- What do you need to be set up to work remotely?
- How to avoid distractions
- How to plan your day

2. Self-management when working remotely

- Energy management
- Goal setting and measuring success
- Personal wellbeing and the importance of breaks
- Achieving an effective work/life balance

3. Staying connected remotely

- Best practice uses of virtual technology to stay in touch
- Using different mediums for communications
- Agreeing communication cadences with the people you need to
- Managing priorities

4. High impact communication using video, voice and visuals

- Getting comfortable with video calls
- Keeping people engaged
- Powerful communication
- Whiteboarding

Target Audience

Sales professionals working from home or in a field-based role.

Business Issues

- Key contacts spending less time in the company office meaning face to face meetings are more difficult
- Increasing globalisation of sales opportunities means that contacts can be out of country (CSR to reduce carbon footprint)
- Changes in work styles and expectations of seller approaches and customer expectations of engagement
- Expectation to use more collaboration tools such as teams to bring disparate stakeholder groups together
- Increased numbers of decision makers, makes face to face group meetings more difficult to coordinate

Program Aim

To enable sales professionals with the key mindset, skillset and toolset to effectively engage and progress opportunities through the sales cycle whilst working remotely. To maximise the customer experience whilst maintaining and/or accelerating the velocity of sales opportunities.

Program Content (4 X 90 minute learning objects)

1. Maximising key selling time

- Energy management – right time for customer engagement?
- Creating a sales mindset when working remotely
- Managing priorities
- Being proactive, being different

2. Developing relationships at a distance

- Analysis to develop customer knowledge
- Identifying and engaging customer stakeholder group
- Gaining access to senior stakeholders virtually
- Identifying the right digital medium and for the right contact (text, Zoom, WhatsApp, e-mail, call)

3. Best practice uses of virtual technology in selling

- Best practice preparation for remote customer meetings
- Facilitating virtual meetings
- Maximising the technology available (whiteboarding, chat)
- Collaborating with your virtual team

4. Managing the virtual sales process

- Managing the sales process (action planning, cadence, roles and responsibilities)
- Using EQ in difficult situations
- Engaging all stakeholders to qualify needs (business and personal)
- Using your virtual team

Virtual Managing and Coaching



Target Audience

Sales leaders working with remote teams.

Business Issues

- Increasing working from home trends is reducing face to face time for managers with their direct reports
- Seller performance issues are identified too late due to a lack of real time coaching and pipeline management
- Increase in seller attrition due to lack of available time with their manager
- Team motivation and cohesiveness is suffering due to remote or disparate teams

Program Aim

To equip sales leaders with the mindset, skillset and toolset to work remotely from their team. To provide structure and cadence to driving consistent seller performance and time cohesiveness.

Program Content (4 X 90 minute learning objects)

1. Self-Management during remote working

- Energy management
- Planning your day
- Goal setting and measuring success
- How to manage your own psychological and emotional state
- Understanding the vital importance of your leadership behaviour

2. Best practice uses of virtual technology in managing remotely

- Developing a team communication cadence over various mediums
- The importance of checking in rather than checking up
- Best practice preparation for remote team meetings
- Facilitating team meetings
- Maximising the technology available (whiteboarding, chat)
- Collaborating with your team virtually

3. Different remote performance meetings and structure

- How to communicate with confidence when things are uncertain
- 1:1 Pipeline review meeting
- 1:1 Forecast review meeting
- Team Learning Huddle
- Team check in and feedback call

4. Managing performance at a distance

- Knowing the performance drivers of individual team members
- Monitoring the psychological bank account of your people
- The importance of different strokes for different folks
- Refresh of GROW coaching
- Sharing best practice
- Giving feedback
- Managing upward communication

Target Audience

All sales roles.

Business Issues

- Customers are changing the way they buy and are increasingly using social networks to measure suppliers
- Sellers are unclear how to effectively use social networking to create contacts and share insights
- Some traditional methods of gaining access to new customers are being blocked
- Sellers are gaining the wrong kinds of reputation from what they share, post and like in social media

Program Aim

To equip sellers with the mindset, skillset and toolset to use social media to gain new contacts, new opportunities and share insights to support their sales effort.

Program Content (5 X 45 minute learning objects)

1. Why are we using Social Selling?

- Setting the context

Setting up your social channels

- How should you brand yourself on social as a seller?
- Personal vs professional use

2. Creating engaging content for your audiences

- Structuring your message
- Aligning content to your organisation's way of selling
- Linking in with your sales process

What does good engagement look like?

- How often, when & what to post?
- Hashtags

3. Platforms

- Understanding the platform
- Tailoring your message
- Link to best practice for common platforms

4. Building a follower base & engaging the community

- Connecting with followers
- Dealing with followers
- Responding to questions

5. Account based marketing

- Coordinating the message across your account
- Personalising your approach to your target audience
- Tracking & measuring success

Target Audience

All sales roles.

Business Issues

- C-level contacts are looking for early engagement that captures their attention and moves them to action to achieve superior business outcomes – the first few minutes make or break the sale
- Prospects are better informed than ever of an organisations history and capability before they engage with sellers – sales people need to bring energy, insight and passion into early communication
- Sellers are largely still dependent on static, overly complex communication media to support their positioning of organisation and solution value to prospects – sellers need to become natural story tellers, free from the constraints of fixed material and messaging

Program Aim

To develop seller capability to tell stories that engage customers and support the progression of sales opportunities.

Program Content (6 X 90 minute learning objects)

1. Introduction to Storytelling in sales

- Information retention through stories
- The effects of stories
- 7 types of stories
- Adaptive storytelling

2. The story process and personal stories

- Keys to a compelling story
- The story journey
- Personal story interview

3. Bring stories to life with visuals

- How the brain processes information
- The importance of visual information
- Whiteboarding tips
- Virtual annotation

4. Telling your organisational story

- What stories do your clients want to hear about your organisation?
- Why are these important?
- When do they need to be told?
- Organisational story framework

5. Solution stories

- The solution picture
- Solution story journey

6. Stories to close business

- AIR objection handling steps
- Stories the close business journey

Target Audience

Mostly aimed at inside sales roles or sellers now working remotely.

Business Issues

- Too few opportunities are initiated by sellers which means the buyer is already more than 50% of the way through their sales cycle
- Insufficient sales pipeline results in inconsistent sales performance
- Sellers have become too reliant on incoming leads and have lost confidence to generate their own pipeline

Program Aim

To develop sales capability and confidence to self-generate new opportunities with existing or new customers.

Program Content (6 X 90 minute learning objects)

1. Outcome based call planning

- Principles of telesales success
- Call planning
- Research to understand the buyer perspective and situation

2. Powerful call openings

- Open, value question – first 90 seconds
- Creating fast rapport
- Responding to customer behaviour
- Managing the call

3. Telephone communication principles

- Voice, attitude, listening
- Powerful language patterns
- Summarising and testing understanding

4. Handling objections

- Preparing for voicemail
- AIR objection handling technique
- Maximising every call

5. Outcome based questions

- Questioning types and usage
- Funnel questioning
- Active listening

6. Selling early value

- Value message flow
- Value in the current and new climate
- Confirming next steps to progress

Account Planning



Target Audience

Aimed at all sellers with account ownership or as part of the virtual account team.

Business Issues

- Too few opportunities are initiated by sellers which means the buyer is already more than 50% of the way through their sales cycle
- Seller knowledge of their customer is insufficient which makes creating insights difficult to drive new opportunities
- Increased competition means sellers need to know their customers better than ever before to retain and expand their share of wallet

Program Aim

To develop seller capability to proactively drive account growth through structured and planned activity.

Program Content (6 X 90 minute learning objects)

1. How to research your customer to find sales opportunities

- Research sources to use
- Using technology to give you information
- Research tools (PESTLE, SWOT, Porters)

2. Building a customer strategy map

- Identifying your customers business strategy
- Mapping the challenges they face
- Identifying how your solutions could help address challenges in the current climate

3. Mapping and managing your customer contacts

- Identifying existing and target stakeholders
- Recognise their KPI's and likely buying motivators
- Building a conversational opener for stakeholders
- Leading successful virtual customer meetings

4. Developing an action plan that works

- Setting an account goal
- Build a short, medium and long term action plan
- Agree key milestones

5. Leading your virtual team successfully

- Identifying stakeholder and virtual team alignment
- Confirm clear roles and responsibilities in the virtual team
- Develop a virtual team engagement cadence and structure

6. Achieving results with the account plan review cycle

- Plan, do review
- Review cadence and agenda
- Lead and lag measures of success

Managing Inside Sales Virtually



Target Audience

Aimed at first line managers now managing inside sales from a virtual location.

Business Issues

- The current climate has changed the dynamics of managing inside sellers
- Inside sellers may have little or no experience of working remotely creating some disruptions and feelings of isolation
- Inside sellers no longer have the structure of being in an office as a frame of reference

Program Aim

To equip inside sales first line managers with the key tools and skills to manage their team virtually.

Program Content (4 X 90 minute learning objects)

1. The change process and supporting people through it

- Understanding the change process and the stages of change that your people will go through
- Recognising where each individual is in the change process
- Applying the appropriate support to help each person progress

2. Communication and contact cadence strategies that maximise team engagement

- Balancing formal and informal meetings
- Establishing an effective meeting cadence
- Different strokes for different folks – treating each person as an individual
- The importance of checking where people are rather than making assumptions

3. Structuring your day and that of your team to deliver maximum results

- Agreeing a team communication cadence
- Managing priorities and those of your team
- Making time for coaching and 1:1 call observation (where technology permits)

4. How to manage your team's performance remotely

- Setting clear expectations
- Identifying the new lead and lag measures of success
- The difference between performance and development coaching conversations
- Building a regular cadence of observation, feedback and action planning discussions

Value Selling in the “New Normal”



Target Audience

All sellers who own sales opportunities.

Business Issues

- The definition of value has changes in the “new normal” environment we are currently in and sellers need to be agile to adapt their approach otherwise opportunities will be lost
- Organisations have to prioritise their spend and this will be based on where the highest value and biggest positive outcome to their business will be
- Sellers who have a predominantly product-based approach will struggle to achieve their number

Program Aim

To equip sellers to quickly identify value based on customer outcomes to achieve success for their customers and their organisation.

Program Content (4 X 90 minute learning objects)

1. Building a customer strategy map

- Identifying your customers business strategy and uncovering their value drivers
- Mapping the challenges they face
- Identifying how your solutions could help address challenges in the current climate
- The importance of understanding the customer buying process and how to enter it early for maximum leverage

2. How to engage successfully with remote stakeholders

- Understand why buyers will buy in the new operating environment
- Identify the target roles or personas who will benefit from your solutions
- Positioning yourself as a strategic enabler
- The importance of understanding the customer buying process and how to enter it early for maximum leverage
- Align your solution outcomes to the KPI's of each buyer/persona
- Consider conversational openers using a proven 5 step structure

3. Qualifying the new reality

- Facilitating whiteboarding conversations using technology
- Outcome based questioning techniques
- Active listening technique over phone or video calls
- Tailoring your questions to different buyers
- The power of case studies to build interest and credibility

4. Articulating your solution and how it delivers value to the customer

- How to leverage “the value equation” and maximise customer value perception
- Adapting your message to the buying group and the individuals within
- Facilitating group calls to present your solution
- Confirming actions and next steps
- Creating a drive for action

Negotiating Remotely



Target Audience

All sellers who own sales opportunities.

Business Issues

- The definition of value has changes in the “new normal” environment we are currently in and sellers need to be agile to adapt their approach otherwise opportunities will be lost
- Organisations have to prioritise their spend and this will be based on where the highest value and biggest positive outcome to their business will be
- Business are under significant cost pressures and will target cost savings as part of their negotiating strategy

Program Aim

To equip sellers to negotiate based on achieving customer outcomes whilst protecting margin for their organisation.

Program Content (6 X 90 minute learning objects)

- | | | |
|---|---|---|
| 1. What is negotiation and how is it different to selling? <ul style="list-style-type: none">• The difference between selling and negotiation and why this is important• The importance of value selling in negotiation | 2. The importance of setting negotiation outcomes and ranges <ul style="list-style-type: none">• The myth of Win:Win• Setting negotiation outcomes• Setting negotiation ranges• The different pressures the current climate will place on buyers and how you can help | 3. 5 stages of negotiation <ul style="list-style-type: none">• What are the 5 stages of negotiation?• The importance of the early stages• Knowing your tradables based on your value selling approach |
| 4. The vital differences between face to face and remote negotiation and what you must do about them <ul style="list-style-type: none">• Best practice uses of technology• Negotiating behaviours that will make the difference to your success• Facilitating group negotiations | 5. How to trade value rather than price <ul style="list-style-type: none">• Identifying value across different buyers• The importance of giving to get and conditional proposals• Anchoring the negotiation outcome to the business value | 6. Handling push backs and closing the deal <ul style="list-style-type: none">• Handling customer push backs and objections• Agreeing clear actions, next steps and timescales• Outcome realisation to aid the close |