

Make it Stick

*Activity Pack*

Insightful Consultative Selling

**Helping lessons learned in training blend in to become *how we work*.**

**To the Learner Leader…**

This suite of activities has been designed to reinforce the key learning from the **Insightful Consultative Selling** course. They have been designed to be led by Team Leaders or designated Trainers and do not require training experience, though for best results we recommend that whoever is leading the activities understands the principles of adult learning and has some experience in leading learning activities.

The suite of activities will provide you with up to six months of learning reinforcement. We recommend that an activity is run each month following the Insightful Consultative Selling course.

When running each activity:

* Ask the group to reflect back on the original course they attended:
* What takeaways they had
* What they have tried to implement
* When revisiting some of these activities for a second time ask them what additional ideas or thoughts they have in applying the concepts and tools in the activities to their job

Each activity will take 10-15 minutes to run depending on the size of the group.

There is one Activity to a page. Each Activity has a brief introduction followed by instructions for the Trainer.

We suggest the following to optimise your learning experience:

* Have the group meet away from their normal workspace
* Make sure mobile devices are switched off so that everyone fully engages
* Make the environment ‘safe’ and encourage everyone to contribute
* Run these activities with everyone standing – try running these outdoors in the fresh air
* Have other team members take the lead and run an activity – this will build confidence and leadership skills
* Don’t be afraid to improvise – the learning needs to be about you and your group so make it meaningful
* When debriefing an activity get the group to reflect on what the activity means for them and what they will do differently or continue to do that underscores the learning points from the activity

**Activities in this pack**

1. Creating a teaching pitch for a buyer
2. Telling a convincing story
3. Cognitive reframing
4. Persuasive tactics
5. Educating my buyers
6. Questioning styles

**Activity 1: Creating a Teaching Pitch for a buyer**

**Introduction**

The third strategy in insight selling is to reach the buyer and reveal new insights about their business that are related to your product/service. The way to do this is to construct and deliver a teaching pitch using the following process:

* The Warmer - Build credibility and show your prospect you understand their challenges. This serves as the introduction for the pitch.
* The Reframe - Connect those challenges to a bigger problem or opportunity they hadn’t previously considered. Build credibility and show your prospect you understand their challenges. This serves as the introduction for the pitch.
* Rational Drowning - Next, show prospects the numbers behind why they should think differently.
* Emotional Impact - Then, create an emotional connection between the pain in the story you’re telling and the pain they feel every day in their organisation.
* A New Way - It’s time to convince them of the solution. Show them the new way they should be thinking about their business.
* Your Solution - Finally, demonstrate how your solution is the best one out there, and how it fits with the new way a prospect should be thinking about their business.

**Instructions**

Ask each participant to think of a new or existing buyer where they understand the challenges the buyer is facing. They spend a few minutes preparing a teaching pitch based on the model above and when directed deliver the pitch to the group who can provide feedback. Here is an example:

|  |  |
| --- | --- |
| **The Warmer** | We understand the pressure that institutions are under currently to provide assurance to their buyers that the advice they are receiving from financial planners is in their best interests and will provide them with long term financial security and peace of mind.  |
| **The Reframe** | One of the key concerns with many financial services firms is that they lack the tools to properly understand and quantify potentially fraudulent activity when it occurs. This was one of the key findings of the recent Mollerson inquiry into financial planning malpractice. |
| **Rational Drowning** | The Mollerson inquiry concluded that a lack of oversight by companies has resulted in major shortcomings in financial planning costing hundreds of millions of dollars in compensation pay-outs and long term reputational damage – the most recent victim being the GFG group which went into voluntary administration last week. |
| **Emotional Impact** | I don’t imagine the issues I have just described are unknown to Beckman Financial as I know that Beckman Financial were one of a number of institutions the Mollerson inquiry scrutinised. |
| **A New Way** | Many institutions such as Beckman Financial already have in place a complex array of systems and processes that satisfy much of the regulatory compliance required. What I am suggesting is an enhancement to and not a replacement of your existing compliance architecture.  |
| **Your Solution** | Our customisable solution brings together data from several sources in your business to give you are real time view of financial planner and buyer relationships including buyer analytics, buyer feedback and a rating system that aligns to key risks and compliance requirements. We have produced a number of simulations that show how it works in practice and the value it brings. |

**Activity 2: Telling a convincing story**

**Introduction**

A convincing story is an opportunity for the seller to demonstrate how their product/service will make a real difference.

The story should be framed around three key questions:

1. What do I want them to learn?
2. What do I want them to feel?
3. What do I want them to do?

The five key components of a convincing story are:

* Change is undeniable – demonstrate keen insight into their world
* Success vs failure – establish why the current state is not good enough. This establishes the ‘why’
* Show results – demonstrate the results of changing
* Show them a different path – map the way forward through the change
* Collaborate on the solution – the buyer and seller are both invested in the solution

**Instructions**

Ask participants to bring with them a brief of a client and a product or service that they are trying to sell to them.

Ask them to construct a story using the following steps:

* Describe what you want the client to learn about the product/service
* Describe how you want them to feel about the product/service
* Describe what action you want the client to take
* Describe all the things you understand about the client’s world and their current pain points that your product/service can alleviate
* Describe some high level results you can share that your product/service brings
* Then structure the story
	+ Your understanding of the client’s world and how the client might be feeling
	+ What your product/service does
	+ Results from other clients about how your product/service has changed their world for the better
	+ The path that you believe the client you are talking to can take to make the change
	+ How you will work collaboratively with this client

Allow 5 minutes for the story to be developed then have each participant in turn pitch their story to the group.

Debrief:

* How does story telling assist in the sales process?
* What can you do to get better at story telling?

**Activity 3: Cognitive reframing**

**Introduction**

Cognitive reframing is a psychological technique that is used to dispute irrational or negative thoughts to find more positive ways of viewing and experiencing events. If the buyer’s thinking is getting in the way of making the sale you can choose to do nothing or attempt to ‘re-frame’ that thinking. Some questions to ask to disrupt a buyer’s thinking and to get them into the learning zone are listed below:

Why?

How?

What have you tried that hasn’t worked?

Have you considered…?

If I said I believe you might have under-invested to achieve this outcome in the past, what would you say?

What will the impact be if you did this?

What will happen if you don’t act?

What’s possible?

How do you know that?

What do you think is missing?

**Instructions**

Break the group into threes with one playing the part of the seller, one the buyer and one observing and giving feedback.

Buyer and seller are to engage in a sales conversation with the seller using the questioning techniques above to reframe the buyer’s thinking. Here is the scenario.

The buyer – You work for a large building company that builds apartment blocks for high density inner-city living projects. You buy the appliances (refrigerators, ovens, cooktops) and choose these based on the design specs for the apartments and the demographic to which the apartments are marketed to. The current project is a high-end block of apartments. You have been advised that the kitchens will be quite small and have no room for an oven and only a small cooktop, microwave plus a half capacity dishwasher. The architect’s drawings have been finalised in this regard including all plumbing.

The seller – You work for Appliances Plus and supply high-end appliances. Your new range includes smaller combination ovens (steam, microwave and electrical) – however they are almost twice the cost. You believe they would be a good fit for this high-end apartment.

The seller has sent the specs of the new combination oven to the buyer who has rejected the idea.

Debrief

* To what extent do you use this technique and with what success?
* What sort of relationship do you need with the buyer to have this type of conversation?

**Activity 4: Persuasive Tactics**

**Introduction**

Salespeople can use these persuasive tactics to influence buyers:

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| Reciprocity | People feel obliged to give back to others the form of a behaviour, service or gift they received first. Reciprocity increases if what was given in the first place was both personalised and unexpected. |
| Scarcity | People have a greater desire for things that are scarce. From a sales perspective, point out what is unique about your proposition and want the potential buyer stands to lose for failing to accept your proposal. |
| Authority | People follow the lead of credible, knowledgeable people. It is important to signal to buyers what makes you and your brand credible and what level of expertise you bring to the sale. |
| Consistency | Personal consistency is highly valued in most cultures. Consistency is activated by small initial commitments that can be made. |
| Liking | People prefer to buy from people they like. We like people who are similar to us, people that pay us compliments and people that cooperate with us towards mutual goals. |
| Consensus | When people are uncertain that can be persuaded by the actions of others to determine their own behaviour. Sellers can use this to point out that other similar customers have bought their product or service. |

**Instructions**

You will need a large open space in which to run this activity.

Firstly go through each of the persuasive tactics above.

* Write each tactic on six different pieces of card or strips of paper
* Use a length of rope about 8m long. Lay this as a circle on the floor to create a perimeter.
* Ask for two volunteers who will be opponents in the activity
* Ask the two volunteers to stand in the middle of the circle. The rest of the group should remain outside of the circle.
* Ask each volunteer to randomly pick one of the six persuasive tactic cards. They are not to show their opponent or the rest of the group
* Explain that each volunteer’s goal is to persuade the other person to go out of the circle using the tactic they have selected. Explain that the person who remains in the circle will receive a prize.
* They cannot touch each other or use physical force.
* The game is over if a contestant is convinced to step out of the circle or the time is up.
* Allocate 5 minutes for this part.
* After five minutes introduce two new volunteers and have them select two new persuasive tactic cards

Debrief

* What tactics did each volunteer use to try and influence the other person to leave the circle?
* How would these tactics be used in a sales role?

**Activity 5: Educating my Buyers**

**Introduction**

Educating buyers means becoming a source of insight in the eye of the buyer. Education doesn’t mean dumping information on the buyer it means taking the time and care to provide information that informs and arouses curiosity and positions the seller as a trusted source. There are a number of approaches you can take:

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| --- | --- |
| New Idea | “I was thinking about what you were saying at our last meeting. I met internally with some of our key experts and we were coming with quite a few ideas that I think you would be interested in. Ideally, I would like to meet with you and Joan, your ops manager, to see whether you think the ideas are worth discussing further” |
| Best Practice | “I have just gone through a benchmarking exercise to benchmark the quality and outcomes of our services and I wanted to share that with you.” |
| New and different | “We have a new product line that we have piloted with another of our clients and I like to share their experiences and results with you as I think could take advantage of it.” |
| Straight Results | “We delivered this solution to XYZ 3 months ago and have just heard that this has resulted in a 20% increase in bookings. I thought you would be interested in this as the bookings function was one of the key areas that you are seeking an improvement in.” |
| First Steps | “We have convened an expert think tank for March 10 which is bringing together leading experts to discuss staff retention in professional services firms. They will be looking for industry input and I was wondering if your firm would like to be part of it. A big plus for being involved is having direct access to these experts and also to their research findings when they appear later on this year.” |

**Instructions**

Ask the group what they are currently doing to educate their buyers using each of the approaches described above.

Brainstorm with the group what else they could be doing using each of these approaches.

* On a whiteboard or piece of flipchart paper write the approach (e.g. “New Idea”) in the centre
* Ask the group to call out any and all ideas or ways in which the approach could be used – what have they done and what could they do?
* List these on the whiteboard/piece of paper
* Discuss ‘how’ they could implement these ideas with their buyers
* Get each participant to draw up an action plan taking three of these approaches and detailing what they will do to implement the ideas the group came up with

**Activity 6: Questioning styles**

**Introduction**

Discovering the needs of buyers is all about asking the right questions. There are five styles of questions that you could ask:

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| Cushions – a phrase between questions | To better understand your situation, could you share with me ...To get a better handle on the big picture, will you explain to me ...I think I might be a little confused, would you explain ... |
| Qualifiers – to qualify the answer | In as much detail as possible... As specifically as possible, could you share with me...What are the top three or four most important issues? |
| Relationship – to monitor how the relationship is going | Am I on track with what you want?Am I handling this to your satisfaction?Are things progressing the way you would like them to? |
| Comparative – to understand how you and your proposal will be evaluated | What is your criteria for making this decision?What factors will you use in making your comparison?How will we be judged? |
| Perception Checking – to ensure the buyer is following what you say | Does that sound reasonable to you?Does this make sense?Is this information helpful to you? |

**Instructions**

Spilt the group into threes.

One person is to play the role of a buyer that they are very familiar with.

The other person is to play the part of the seller.

The third person is to observe and is to keep a tally of how many times each of the questioning styles above is used.

They are to have a conversation with the buyer that is still in the ‘exploratory’ phase of the relationship where the seller is introducing the company’s product/service offering and is at the point of developing and submitting a proposal

The seller is to use as many of the questioning styles above in the conversation.

Debrief:

* What did the observer note about which questioning styles were used?
* From the buyer and seller’s perspectives did the range of questioning styles enable a freer and fuller flow of information between them?
* For the seller – which questioning styles are you more comfortable in using and which ones do you need to practice more?