

Creating Sales Success

Business Development, Achievement and Success

Facilitator Name

***Lighthouse
Learning and Development***

IMPORTANT NOTICE

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PREPARATION

FACILITATOR WELCOME

Welcome to the facilitator guide for the workshop Creating Sales Success. The goal of this guide is to lead you through facilitating the concepts, discussions, and activities used throughout the workshop.

HOW THIS FACILITATOR GUIDE IS ORGANIZED

This guide is divided into nine modules:

1. Preparation
2. Module 1: Introduction to Building Sales Success
3. Module 2: Planning
4. Module 3: Time Management
5. Module 4: Prospecting
6. Module 5: Goal Planning
7. Module 6: Client Interaction
8. Module 7: Appendix

HOW TO USE THIS FACILITATOR GUIDE

This guide provides step-by-step instructions for facilitating the workshop. The workshop is divided into modules that correspond to an idea, activity, or video.

The modules contain numbered steps that correspond to what you need to do or say at a given point. Facilitate the workshop by following the sections in the order in which they appear. Summary and transition statements appear at the end of each module, and introductory statements appear at the beginning of each module to help you connect ideas in a logical flow.

FACILITATOR PREPARATION CHECKLIST

Use this checklist to prepare for the workshop.

- Read through this facilitator guide thoroughly and carefully. Part of the success of this workshop relies on the examples, so take time to rehearse the examples so you can relate them quickly and smoothly.
- Familiarize yourself with the flow, objectives and content of each module.
- Review the suggested statements and questions thoroughly. You may either read these from the guide as you facilitate the workshop, or you may paraphrase the content.
- Schedule a room, date, and time for the workshop.
- Schedule audio and video equipment
- Collect all materials

Note:

- Although this facilitator guide provides some suggestions for what to say and do, use your creativity to present ideas and generate discussions. Use your unique abilities, experiences, stories and energy to enhance the workshop.
- Visually script and practice delivering personal examples of concepts both where the facilitator guide suggests using them, and where you feel they would best fit.

WORKSHOP MATERIALS

The following is a list of materials you and the participants will need for the workshop. Review this list before you facilitate the workshop to ensure that you have all the materials you need. Also, verify that any equipment needed is in working order.

- Facilitator guide
- Participant workbook
- Flipchart stand, pads, and flipchart markers
- Laptop computer
- Laptop computer speakers
- LCD projector
- Pen or pencil for each participant
- Name tags or name tents
- Power cord extension cable (just in case)

WORKSHOP LOCATION AND ROOM ARRANGEMENT

The following location and room arrangement is recommended

- A room large enough to comfortably accommodate tables and chairs for the participants and space for the equipment (facilitator flipchart, LCD projector, laptop computer, table, etc.)
- Enough tables so participants can spread out, Round or rectangular tables seating four to six participants tend to be most conducive to group interaction.
- Tables arranged so participants can see you, see each other, and easily move around the room.

FACILITATOR OBJECTIVES

Before you review the workshop contents, take some time to familiarize yourself with the following information:

- Setting a tone and an atmosphere in which sharing is safe, learning is exciting, and trust is established in the participants' relationships.
- Guiding group discussions while avoiding inappropriate personal comments, non-constructive criticism, and grand standing.
- Making needed adjustments in pacing, balancing participant, and involving and challenging participants.

Timing and Pacing

For most of the activities (whether group, partner, or individual) a time limit is given. Please follow these time limits as closely as possible to ensure that you have ample time to complete all modules of the workshop.

Breaks

Breaks have been included in the facilitator guide though you may adjust timing and provide additional breaks to maintain the participants' energy and interest.

Learning Objectives

General learning objectives appear at the start of each section. Specific objectives for the activities and discussions appear throughout the facilitator guide.

Participants

Class size may vary 12 – 24 is recommended

Participant Involvement

This workshop provides many opportunities for participants to practice and apply concepts and skills through individual and group activities.

Equipment

Ensure the classroom is comfortable and the equipment and supplies are in good working order.

WORKSHOP OUTLINE

MODULE 1 INTRODUCTION	TIME
Welcome and Introductions	15 minutes
Expectations and Benefits	10 minutes
Total	25 minutes

MODULE 2 PLANNING	TIME
Planning	10 Minutes
Characteristics of a good plan	20 Minutes
Visualization	20 Minutes
Your vision your goals	5 Minutes
Break	15 Minutes
Why set goals	25 Minutes
Goal setting tips	25 Minutes
Goal awareness and business growth	35 Minutes
Total	2 Hours 35 Minutes
Lunch	1 Hour

MODULES 1: INTRODUCTION TO CREATING SALES SUCCESS

INTRODUCTION INSTRUCTIONS

- Remove all distractions: discuss breaks, lunch and cell phone usage
- Promote a collegial environment of interaction and rapport
- Share the benefits of the workshop and their desire to learn
- Allow participant introductions

MATERIALS NEEDED FOR THIS MODULE

- Copy of the participant guide
- Name tent cards
- Flipchart stand, pad and markers
- PowerPoint slides
- Participant sign-up sheet (if required)

MODULE CONTENTS	TIME
Welcome and Introductions	15 minutes
Expectations and Benefits	10 minutes
Total	25 minutes

WELCOME AND INTRODUCTIONS

Display Welcome Slide



Once participants are seated and settled, do an energetic welcome

Say:

Today's workshop Creating Sales Success is designed to maximize your natural abilities in creating sales success. The content is broad in its scope with common sense real world applications.

INTRODUCTION

Say:

Turn to page 4 of your participant guide.

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CREATING SALES SUCCESS

We at Lighthouse Learning and Development appreciate your participation in our sales performance workshop, Creating Sales Success. Realizing what is natural and enjoyable is essential to achieve maximum business satisfaction, success and productivity. Identifying marketing and sales growth methodologies that maximize your natural abilities is the foundation of our program.

A major part of a successful business is evaluating which business planning and marketing strategies create growth and why. During this workshop we will evaluate goal planning, time management, prospecting and client interaction strategies.

Our aim is to determine the best sales structures and implementation practices to take advantage of your individual proficiencies.

EXPECTATION

Say:

Turn to page 4 of your participant guide.

- *Provide a brief overview of the workshop.*

Ask:

What are your expectations from today's workshop?

Note:

Listen to participant's expectations and respond briefly if their expectation is realistic in this workshop.

Asking the question has two benefits – first it allows you to hear the expectations of the class; and second, it helps you ensure that the expectations are in line with the class objectives.

MODULE 2: PLANNING

INSTRUCTIONS

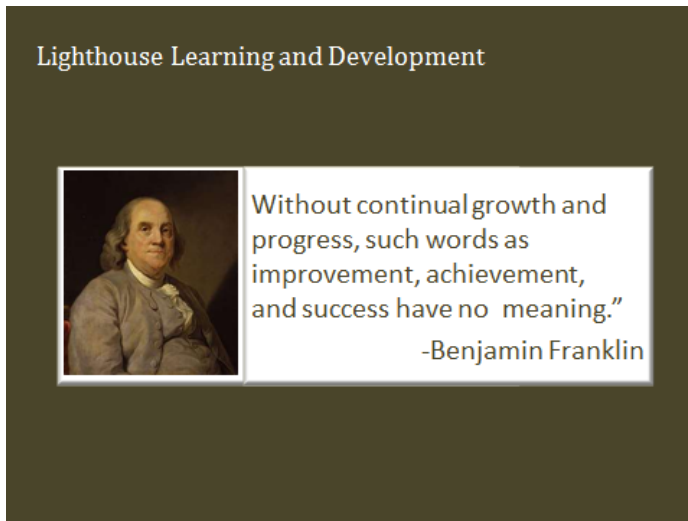
- Remove all distractions: discuss breaks, lunch and cell phone usage
- Promote a collegial environment of interaction and rapport

MATERIALS NEEDED FOR THIS MODULE

- Copy of the participant guide
- Flipchart stand, pad and markers
- PowerPoint slides

MODULE CONTENTS	TIME
Planning	10 minutes
Characteristics of a good plan	20 minutes
Visualization	20 minutes
Your vision your goals	5 minutes
Break	15 minutes
Why set goals	25 minutes
Goal setting tips	20 minutes
Goal awareness and business growth	30 minutes
Total	2 Hour 25 Minutes

Display planning slide



Ask:

What does this mean to you?

Say: *Optional*

When you grow professionally, you create new opportunities that contribute to sales and business growth.

PLANNING

Ask:

Can I have a volunteer read page 6 of your participant guide aloud?

Planning

PLANNING

Planning is determining the activities required to reach an objective while making the best use of your natural abilities. To achieve a vision or a goal it is important to plan with the end in mind as you set goals, outline task, and develop strategies, to achieve your visions.

A goal without a plan often remains a collection of intentions, ideas, and dreams that never happen. As such, it is important that business owners, employees and sponsoring organization have access to a solid plan that offers the opportunity to develop, achieve, and succeed.



1. Ask:

In your experiences with planning what is the one thing that determines the ultimate success of a plan?

Possible Responses:

- The human element
- The individual
- The plan creator

2. Ask:

What are some of the things the individual must have for a plan to succeed?

Possible Responses:

- Commitment
- Involvement
- Focus
- Persistence.

Note:

- Allow multiple responses to each question.
- Record the responses on a flip chart. (Optional)



CHARACTERISTICS OF A GOOD PLAN

Ask:

Can I have a volunteer read page 7 of your participant guide aloud?

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CHARACTERISTICS OF A GOOD PLAN


A well-conceived and written strategic plan has to help the individual, team or organization achieve their goals at each phase. Characteristics of a good plan have less to do with the plans' design and more to do with its practicality and clarity. To these ends, good strategic plans share the following characteristics.

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Activity:

Have participants turn to page 4 of their participant guide.

Planning



- Provides a sense of direction to various activities _____
- Planning that leads to saving time, effort and money is _____
- _____ planning essentially involves choices among various alternatives

It is not merely guesswork but rational thinking _____

_____ planning must provide enough room to cope with the changes in customer demand, competition, and government policies etc.

Planning that is a never ending function due to the shifting business environment _____

Practical

Flexible

Efficient

Goal Oriented

Specific

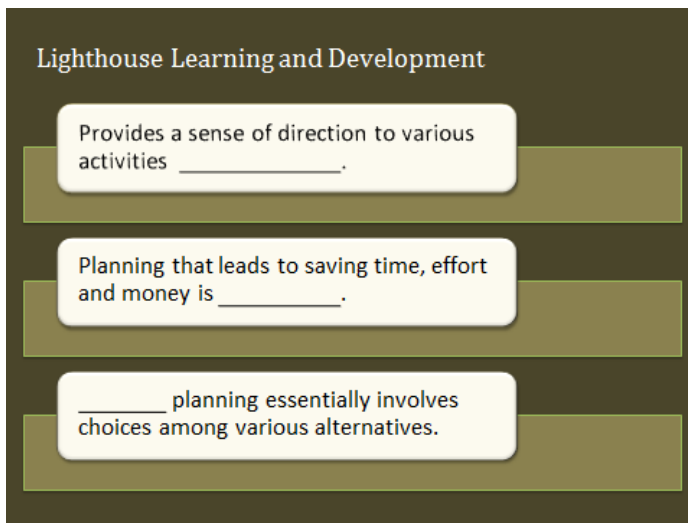
Continuous

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Activity:

- Have participants work in table groups.
- Have participants use word puzzle at bottom of page 8 to complete activity.
- Give participants 5 minutes to complete activity.

Display Characteristics of a Good Plan slide 1.



Activity:

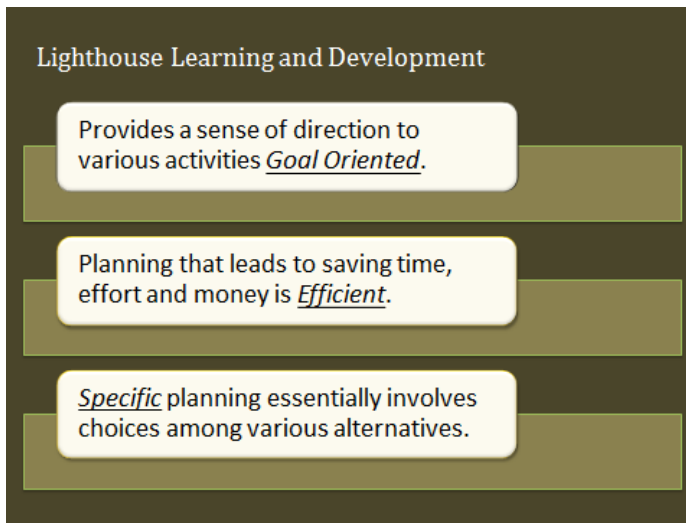
- Ask volunteer to read aloud his or her table group's responses to (top part of page 8 questions 1-3)

Note:

- Some answers might vary - do not argue with participant responses.
- Introducing the Characteristics of a Good Plan is the purpose of the activity.

Activity:

- Display Characteristics of a Good Plan slide 2
- Review slide (top part of page 8 questions 1-3)

**Ask:**

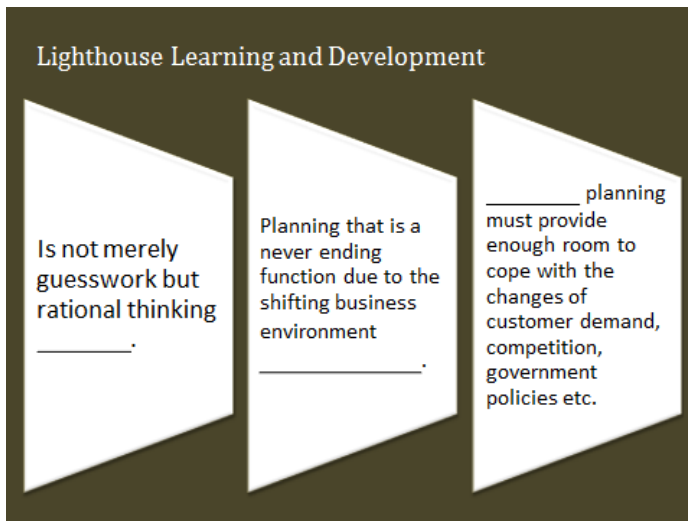
- Can I have a volunteer give me some examples of specific planning?

Possible Responses:

- Number of sales units needed based on specific cost
- Prospecting conversion and pull through rates.

Activity:

- Display Characteristics of a Good Plan slide 3
- Ask volunteer to read aloud his or her table group’s responses to (bottom part of page 8 questions 4)

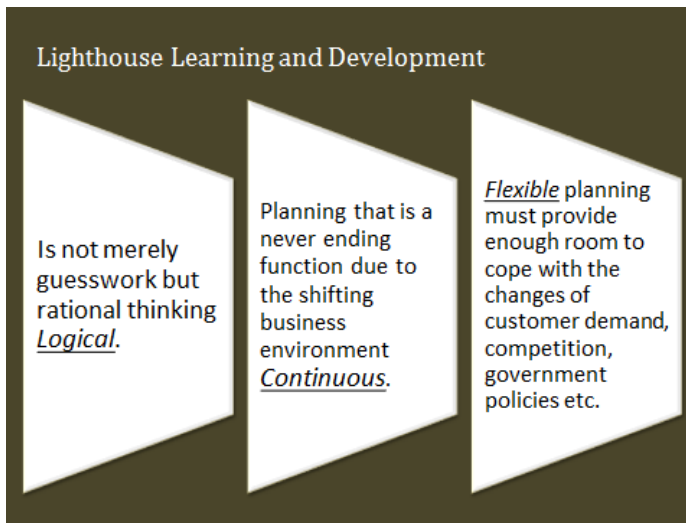


Note:

- Some answers might vary - do not argue with participant responses.
- Introducing the Characteristics of a Good Plan is the purpose of the activity.

Activity:

- Display Characteristics of a Good Plan slide 4
- Review slide (bottom part of page 8 questions 4-6)

**Ask:**

- What might be an example of guesswork when planning?

Possible Response:

- Having a revenue goal without determining number of sales needed to achieve the goal

Say:

Market conditions continually change and good planning should be continuous and have the flexibility to adjust to the varying circumstances. Sound planning requires a periodic review which enables change of focus and allows for plan adjustments to take advantage of new opportunities.

VISUALIZATION


Say:

Can I have a volunteer read page 9 of your participant guide aloud?

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VISUALIZATION

Visualization is an important goal achievement tool as mental imagery precedes physical creation. It helps us clearly see the outcome we desire as we work to achieve our visions.

<i>RIGHT BRAIN</i>		<i>LEFT BRAIN</i>
<i>Intuitive Holistic</i>		Rational Logical
<i>Integrative Creative</i>		Verbal Intellectual
<i>Visual Non-verbal</i>		Analytical Linear
<i>Symbolic Artistic</i>		Sequential Explicit
<i>Spontaneous</i>		Positive

Scientific studies show that the more senses you add to your imagery, the more powerful the results. The reason these techniques are so powerful is that they tap into both the left and right parts of your brain. For people who have trouble visualizing things with their eyes closed, just use all the other senses to imagine what you want to create.

Ask:

1. Who would like to share their thoughts on visualization?

Possible Responses:

- I don't see much value in visualization
- I practice visualization often
- You have to first believe before you realize your dreams

Ask:

2. What are some of the practical benefits of visualization?

Possible Responses:

- It helps you prepare for a meeting
- It helps you prepare for a phone call

Activity:

- Have participants review the of left and right brain traits center page 9

Ask:

3. Are you left brain or right brain dominant?

Activity:

- Have participants write their dominant brain side on the blank line at the bottom of the page 9 (optional)

Note:

- Asking the visualization question has two benefits – first it will identify the participant's level of belief in visualization; and second, it helps participants identify the practical benefits of visualization.
- All views are accepted the objective is to encourage conversation

Ask:

Can I have a volunteer read page 10 of your participant guide aloud?

Planning

YOUR VISION YOUR GOAL

There is a strong relationship between success and effective goal planning. Long-term goals often are our most meaningful and important goals. Yearly and lifetime goals give clear focus for the future.

Short-term goals are progress acknowledgements that help us realize our long-range visions. Daily, weekly, and monthly goals provide a measure of our progress as we work toward long-term goals.

There are many goal-planning techniques each of us must find the method that works best. One technique that is universally recognized is putting our goals to pen and paper. When we write our goals, we turn our thoughts into something tangible. You can actually see it, touch it, and even smell it if you wish. Your goal is no longer just a thought! It becomes something that inspires and creates awareness.

As we focus our awareness, we discover the activities needed to achieve our long-term goals. Choosing the best activities is fundamental. A sense of accomplishment comes each time we make a beneficial choice.

“I can't change the direction of the wind, but I can adjust my sails to always reach my destination.”

-Jimmy Dean

WHY SET GOALS?

Activity:

Have participants read page 11 of their participant guide individually?

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WHY SET GOALS?

Setting goals gives you long-term vision and short-term inspiration. It focuses your activities, and helps to organize your time and resources so that you can make the most of your business.



There is a strong correlation between a _____ business and an effective goal planning process.

Achieve your big goals by successfully planning the smaller ones.

Activity:

- Have participants fill in blank at the bottom of page 11

Ask:

1. Can I have a volunteer share their answer from the bottom of page 11?

- *Correct response* - successful

Say:

There is correlation between goal setting and earnings. Some studies show an increase as much as nine times. This number might seem a bit high but imagine the impact even if the increase is only twenty percent.

Ask:

2. In your estimation what percentage of Americans set goals?


Ask:

3. In your estimation what percentage of Americans writes their goals down?

Ask:

4. In your estimation what percentage of Americans reviews their goals periodically?

Note:

- Allow one or two responses to each of the goal setting questions.
- Record the responses on a flip chart. (Optional) 

Activity:

- Display goal percentage slide
- Review data from the David Kohl study
- Compare study data to participant responses (optional)

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According to a study conducted by Dave Kohl, professor emeritus at Virginia Tech.

- 20 percent of Americans set goals
- Less than 16 percent write their goals down
- Less than 1 percent reviews their goals periodically

Note:

- Emeritus pronounced (**e-mer-i-tus**) Retired but retaining an honorary title corresponding to that held immediately before retirement: *a professor emeritus*.

GOALS SETTING TIPS

Activity:

Have participants turn to page 12 of their participant guide.

Planning

GOALS SETTING TIPS

1. Set goals that take advantage of your natural abilities. Each goal should be specific, _____ and _____ .
Write goals that reflect all three components. Ensure your goals are not vague know exactly what you want and how you will achieve your desires.
2. Write down your _____ goals. Examine different aspects of your life, such as career, education, finances, spirituality, travel, personal health and relationships. Write down what you want to achieve in each of the selected areas. Limit your ideas to goals you want to achieve, not goals that others would select for you.
3. Set intermediate goals. It is our nature to want immediate results. However, some goals will require a great deal of _____ and _____ to accomplish. When writing out long-term goals, break them into smaller, more achievable goals.
4. Set short-term goals to complete within each _____ of time you set. Make sure the goals will advance you toward achieving your long-term goal.

time
increment

life
time Bound

measurable
effort

Activity:

Have participants turn to page 13 of their participant guide.

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5. Divide your _____ goals into smaller, more immediate activities. Choose immediate activities that advance you toward achieving the short-term goal. Set each activity within the time frame for achieving the short-term goal.
6. A major hurdle many people face when planning their goals is _____. They might set goals, due to fear, they never take action to achieve the goals they have set. In order to ensure successful _____ achievement one must conquer their fears.
7. Conquering fear. To do this first identify the doubts you have about your goals. If you doubt having the skills needed to accomplish your goals, or feelings of inadequacy, create _____ goals to address each fear.
8. Putting your plan into _____ is the most important step when it comes to achieving your goals. You should have a main goal with monthly, weekly, and daily sub goals to help you achieve your overall objective. It is good to review, _____, delete or add to your goals periodically.

separate
action

goal
Short-time

modify
fear

Activity:

- Pair up participants to complete pages 12 and 13 of the participants guide.
- Have participants use word puzzle at bottom of page to complete activity.
- Give participants 10 minutes to complete activity.

Activity:

Review page 13

1. Have a volunteer answer number 1
 - Correct response – *measurable and time-bound*
2. Have a volunteer answer number 2
 - Correct response – *life*
3. Have a volunteer answer number 3
 - Correct response – *time and effort*
4. Have a volunteer answer number 4
 - Correct response – *increment*

Review page 14

5. Have a volunteer answer number 5
 - Correct response – *short-term*
6. Have a volunteer answer number 6
 - Correct response – *fear – goal*
7. Can I have a volunteer share their answer for number 7?
 - Correct response – *separate*
8. Can I have a volunteer share their answer for number 8?
 - Correct response – *action - modify*

Note:

- Some answers might vary - do not argue with participant responses
- Introducing the Characteristics of a Good Plan is the purpose of the activity

GOAL AWARENESS AND BUSINESS GROWTH

Activity:

Have participants read page 14 of their participant guide individually?

Planning

GOAL AWARENESS AND BUSINESS GROWTH

Recent studies on goal awareness indicate less than 20% of managers and sales representatives know the goals of their organization. The effect of mission, purpose or “vision” on growth found a strong, positive relationship between the presence of clearly communicated corporate goals and growth in sales, and profit. Growth for “no mission” companies was only 5.5 percent compared to 12.4 percent for the “goal-directed” companies.

In a 2007 study by the Center for Advanced Research across industry sectors, the Center found that close to half (46%) of front-line employees blamed corporate leaders for not clearly communicating their goals to them. A full third of senior executives agreed with them. Additionally, even when goals were known, 41 percent of workers said they did not understand what they personally were supposed to do each day to help achieve their company’s goals.

This case study describes and analyses the growth of David Smith a sales representative for the Ivanhoe Service Group. David has been with the company for less than a year working without defined corporate or personal goals. Due to organizational struggles Ivanhoe Service Group’s management adjusted its strategic plan and implemented new responsibilities for employees. One of the main components of the new plan is the sales representatives’ submission and implementation of personal goals and execution plans.

Activity:

Have participants read page 15 of their participant guide individually?

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David's challenge is both developing feasible goals and a prospecting plan to build a client base with growth potential. Management assigned David accounts from his predecessor to help in his business development. Many of the assigned accounts were loyal to his predecessor and openly exhibit their dissatisfaction with his departure.

Ivanhoe Service Group is an international business. However, its management believes in giving local sales representatives responsibility for managing the markets they know best. Key initiatives are winning a larger market share and continued organic growth.

The Mid Atlantic district has an annual revenue goal of 4.5MM David is responsible for 20 percent of the district goal. The districts' average revenue per seminar is 15k. The standard cost per participant is 300 dollars. Mid Atlantic competitors provide similar products and services with more alternatives and price choices from 300 to 500 dollars per participant.

In working toward Ivanhoe Service Group's mission David must set a range of goals and objectives which also need to include organizational targets.



Activity:

Have participants turn to page 16 of their participant guide.

Planning

Imagine that David Smith was referred to you by one of your top clients. He is working to develop a goals and execution plan. How would you answer the following questions?

1. What goal recommendations would you make to David Smith?

2. What participant cost would you recommend?

3. Using your recommended participant cost how many seminars will David need to achieve his 20 percent of the districts goal?

4. What recommendations would you make for handling dissatisfied assigned accounts?

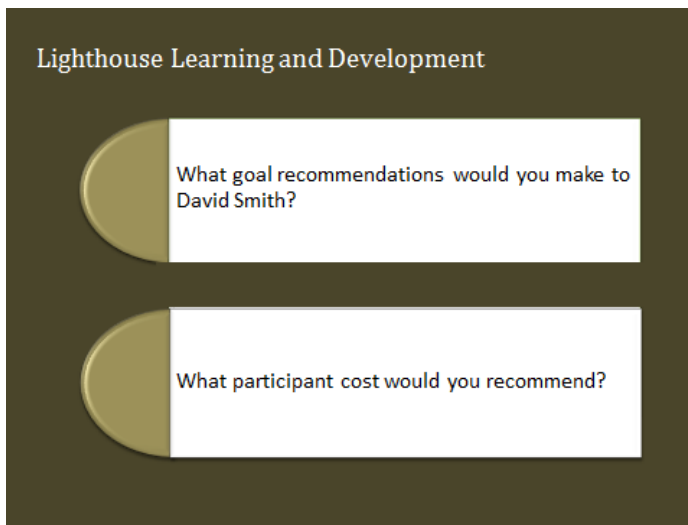
1. Activity:

- Instruct participants to complete page 16 of their participant guide individually.
- Give participants 10 minutes to complete activity.

2. Activity:

- Have participants discuss their individual recommendations in table groups.
- Give participants 10 minutes to complete activity.
- Encourage each participant to share their recommendations.

Display Goal Awareness and Business Growth slide 1



Ask:

- Can I have a volunteer share their goal recommendations aloud?
- Can I have a volunteer share their cost recommendations aloud?
- Do you think it better to have lower or higher participant cost and why? (optional)

Note:

- Participants should respect all perspectives

Display Goal Awareness and Business Growth slide 2

**Ask:**

- Can I have a volunteer share their recommendation for the number of seminars needed for David to achieve his 20 percent of the district's goal aloud?
- Can I have a volunteer share their recommendations for handling dissatisfied assigned accounts aloud?

Note:

- Participants should respect all perspectives