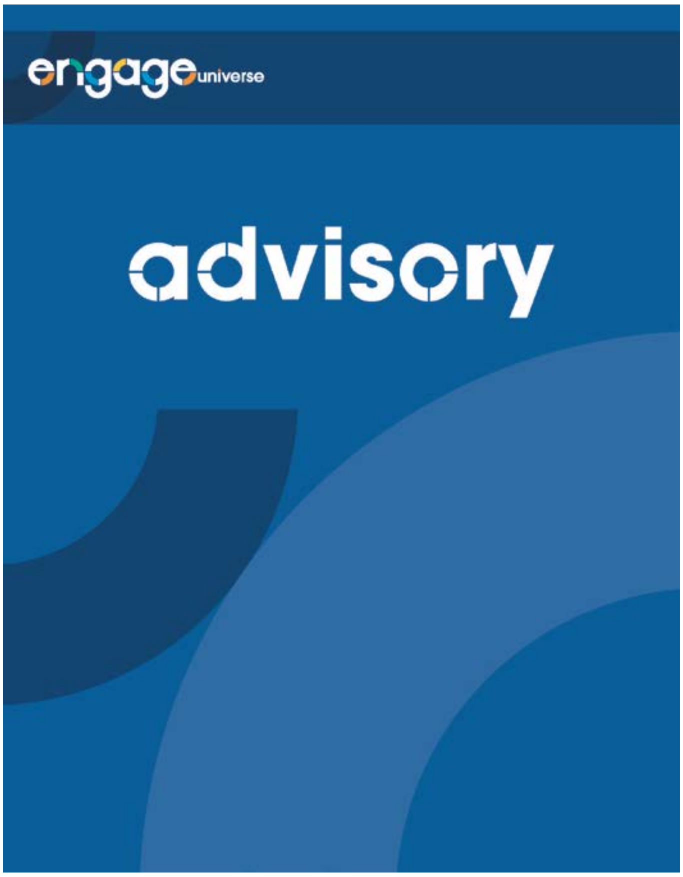
Learning Application Review



Both individuals and the business have made a significant investment in your engage universe training programme. The purpose of this review is to ensure that the value of this investment is realised through the application at the workplace of lessons learned during the training programme.

<u>This review should be carried out on your direct reports</u> who have attended the programme and completion of these reviews forms part of your staff development responsibilities.

An initial review should be carried out within 6 weeks of the end of the programme, targeting a specific client opportunity. Subsequent reviews should be undertaken quarterly. You should set aside at least 1 hour to conduct a proper review.

The overall objective of the engage training is to introduce teams to an approach and a set of tools that they can apply when communicating with clients to enhance our relationships; positioning us as a trusted advisor; and as a result winning more assignments and increasing client loyalty.

Although this review document follows a certain structure, it is not intended to be prescriptive. The intention is to provide a framework and prompts to facilitate a meaningful review of a participant's learning and the review discussion may take any course, with two provisos:

1. The key elements of engage are reviewed
2. Comments on progress made and/or difficulties encountered are noted below

When reviewing application, focus attention on the outcomes achieved, in terms of immediate financial benefit (sales) and client feedback (long-term relationship).

Client organisation name	
Individual client name	
Position in organisation	
Individual's degree of buying influence (Low / Medium / High)	
Current relationship score (https:/www.salesroad.com/public/rs/meeting-assessment-1.html)	
Date and nature of last contact	
Date and place of client discussion	
Date of training programme	
Date of this review	

Key Application Review Area 1 – Establishing rapport

Prior to speaking / meeting the client what research did you undertake?
Comments:
Participants should know to always research the current situation before starting a discussion – even with a client they know well.

How did you open the discussion and what was the client's reaction?
Comments:
Participants were shown how to open a discussion using I We U (to ensure a focus on outcomes and value for the client): ▪ **I** – establish what you are trying to achieve for your client – your *Intent* ▪ **We** – suggest options and agree how to use the time available for your client's benefit ▪ **U** – explain what value you hope the client will get from the conversation. Ideas, shared experience, contacts or something else?

Key Application Review Area 2 – SHAPE questioning

What type of questions did you ask and how much time in each phase?
Comments:

Participants learned the SHAPE questioning approach, designed to encourage a broader, deeper understanding of clients' goals, opportunities, challenges and priorities.

Ask for examples in each category and for the impact on the client.

• **Surface** facts (seeking basic info)	E.g. "What is your typical time to market for new products?"
• **Hunt** for challenges (seeking negative implications of facts)	E.g. "How does time to market impact sales growth?" or, stronger, "Are wholesalers complaining about time to market?"
• **Adjust** for priorities (seeking confirmation / permission)	E.g. "Is this a key priority right now?" or "Is it OK if I ask a few more questions on this to understand the issue fully?"
• **Paint** for outcomes (seeking future benefits of change)	E.g. "How would an improvement in time to market affect wholesaler relationships?" or "If you were able to improve time to market by 10%, would that open up new market opportunities?"
• **Engage** for action	E.g. "How do you plan to take this forward?" or "What do you see as the next steps?" or, if we're feeling confident: "How can we help you with that?"

Key Application Review Area 3 – Positioning your offerings

What did you say to position your offerings?
Comments:
Participants learned to always focus on the value of offerings to the client. They learned to avoid using jargon and focusing only on features of our offering, instead to use simple language and describe how clients might benefit from working with us in terms of: • money (made or saved); • time (saved and freed); • comfort and trouble (improved profile, credibility, respect; less worry). Ask for examples of how participants positioned their sales messages to demonstrate this focus on the benefit to the client.

What stories or examples (versus vague or grandiose statements) did you share with the client to prove capability?
Comments:
Participants learned to use a Need-Feature-Benefit construct, both to ensure a focus on how we can deliver value in area where they have said they have a need, and also as a means of quickly framing stories to prove capability. E.g. “You said you have a need for improved ....” “We recently implemented a similar system at XXX to tackle the challenge of ...” “This resulted in faster processing which in turn led to a 2% increase in overall productivity”