2024

Sales Workshop Catalog

vantage PARTNERS

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Sales Academy

The Vantage Sales Academy is a modular offering from which clients can select the competencies (from one to many) and learning formats (virtual instructor-led, classroom, digital on-demand) to best meet their needs and address identified gaps.

Learning Formats

- Instructor-led
- Classroom
- On-demand

No two businesses are the same — their sales and account management training shouldn't be either. Vantage will build a custom course tailored specifically to your organization's needs.

Sales and Account Management

- Customer Negotiation: Strategies and Skills
- Influence, Persuasion, and Stakeholder Management
- Building Sustainable Customer Relationships
- Needs-Based Value Selling
- Selling to the C-Suite
- Hybrid and Virtual Selling and Customer Engagement

Business Acumen for Sales

- Becoming a Trusted Advisor
- Emotional Intelligence for Sales
- Difficult Customer Conversations
- Structured Communication
- Executive Presence for Sales
- Extraordinary Customer Presentations and Pitches

People Acumen for Sales

- Building Your Account Leadership Brand
- Data and Analytics-Driven Storytelling
- Leading Change and Transformation
- Sales Leadership and Coaching
- Business Territory and Planning for Sales
- Strategic Thinking for Sales

Needs-Based Value Selling

In today's complex sales environment, salespeople must move beyond transactional sales, which risk commoditizing companies' products and services. Instead, they must justify the value of their solutions and refine that value story jointly with customers. Doing so enables your customer to defend your proposal internally, even when you are not there. This requires deep discovery, and understanding of what is truly "of value" to your customers. This course will explore how to discover customer needs, proposing winning solutions, craft compelling value stories and defend against the competition.

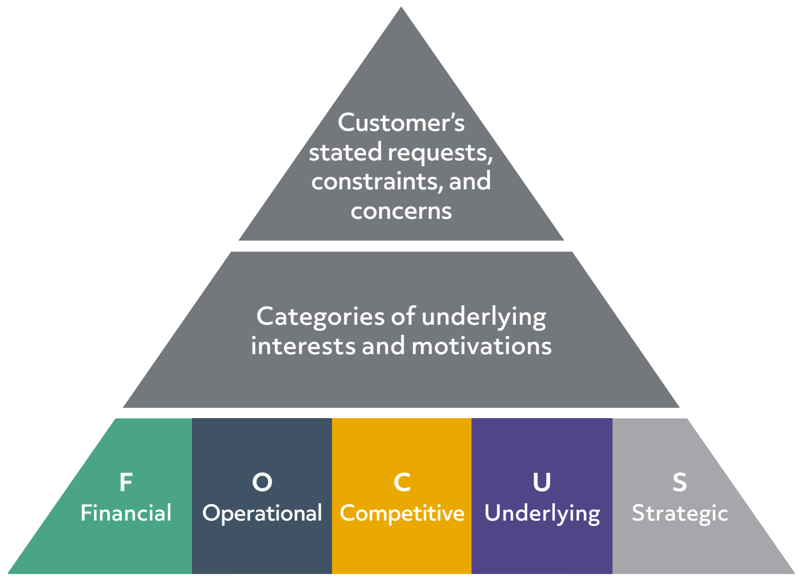
Learning objectives

- Develop a common framework and language for engaging customers around the value of solutions to take competitor share and drive customer account revenue
- Uncover customer needs to connect them to the value of solutions, in order to command premium pricing, differentiate solutions, and take competitive share
- Define enhanced value-propositions relative to the competition
- Enhance ability to calculate and quantify customer value, while managing potential objections and avoiding the need to discount to close deals

Key topics

- Customer engagement model
- FOCUS tool for understanding customer needs
- Solution analysis tool to compare proposal to competitor offerings
- Customer objection role-play and Jeopardy

Bringing Customer Needs into FOCUS



Hypothesis-driven vs. Open-ended Questions

Ask open-ended questions to

- Learn about an issue or topic about which you have little or no information.
- Create space for someone to share whatever is top of mind for them.
- Broaden the aperture of discussion, and ensure you don't limit conversations to the boundaries of your own knowledge.

Ask hypothesis-driven questions to

- Test or confirm a hypothesis you have about the client's needs.
- Demonstrate your knowledge of the client context or challenge.
- Identify additional interests and opportunities, including those the client (or broker) might not be fully aware of.
- Engage someone who is closed-off.

Selling to the C-Suite

Selling to the C-Suite requires a different mindset, approach, and set of skills than selling to typical customers. To engage with impact it is critical to understand the priorities and challenges of executive stakeholders, delivering strategic insights rather than pushing products and services. This requires extensive preparation to make the most of limited time. This course leads selling professionals through the entire C-Suite engagement lifecycle, utilizing Vantage's C-Suite Selling Playbook, and extensive application opportunities to successfully elevate the conversation, so that you don't just get to the C-Suite, you stay there.

Learning objectives

- Learn about, and how to overcome, common C-suite engagement challenges
- Determine which accounts are worthy of a C-suite engagement strategy
- Identify key requirements for getting in the door of the C-suite, what to talk about, and how to frame the conversation when you get there
- Learn directly from C-suite executives about what works and what doesn't when engaging with them
- Build a C-suite engagement roadmap and know how to execute directly following the training

Key topics

- Meeting simulations and coaching
- Account profiling
- Influence mapping
- Panel discussions: including C-suite executives

C-Suite Selling Pitfalls

1	Inadequate preparation.
2	Failure to establish credibility.
3	Speaking the wrong language.
4	Failure to deliver strategic insights.
5	Seeking to sell.
6	Failure to solicit an assigned action that requires reporting back.

The 5 Ps

1	PURPOSE	**Why** does this meeting matter to the executive?
2	PRODUCT	**What** is the concrete output this meeting will produce?
3	PEOPLE	**Who** else should be at the meeting?
4	PROCESS	**How** will we conduct the meeting? What is the agenda?
5	PREPARATION	**What** needs to be done in advance?

Hybrid and Virtual Selling and Customer Engagement

Virtual selling and engagement with customers has become pervasive, but still poses challenges distinct from in-person interaction. Success increasingly requires optimal integration of virtual and F2F customer engagement. This program explores common virtual selling pitfalls and how to avoid them, equips participants with best practices for getting the most out of the latest digital tools, and provides guidance on how to create and execute hybrid sales and customer engagement strategies.

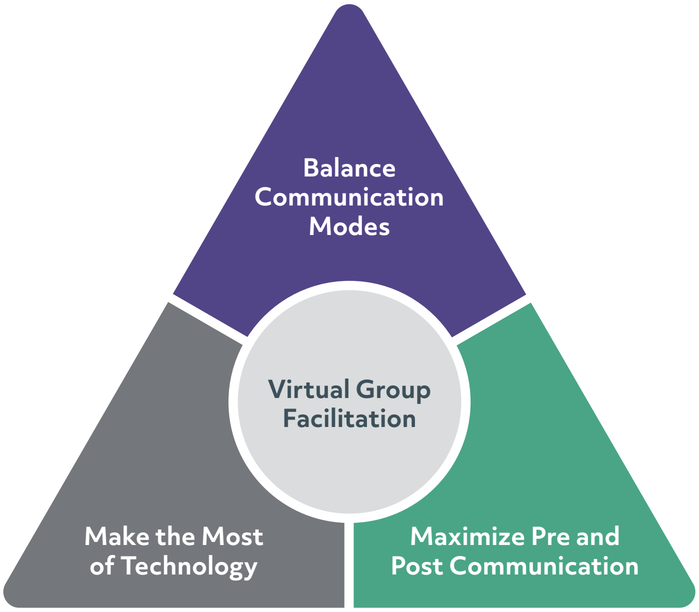
Learning objectives

- Help sellers understand the similarities and differences between in-person and virtual selling and avoid virtual selling pitfalls
- Learn how to establish rapport and build trust with new customers in a virtual environment
- Enhance virtual "presence" to capture and keep the attention of a multi-stakeholder audience
- Master techniques for customer/buyer engagement during virtual sales meetings including how to adapt content and presentation style to a virtual environment
- Learn how to take full advantage of technology to maximize interactivity and engagement during virtual selling

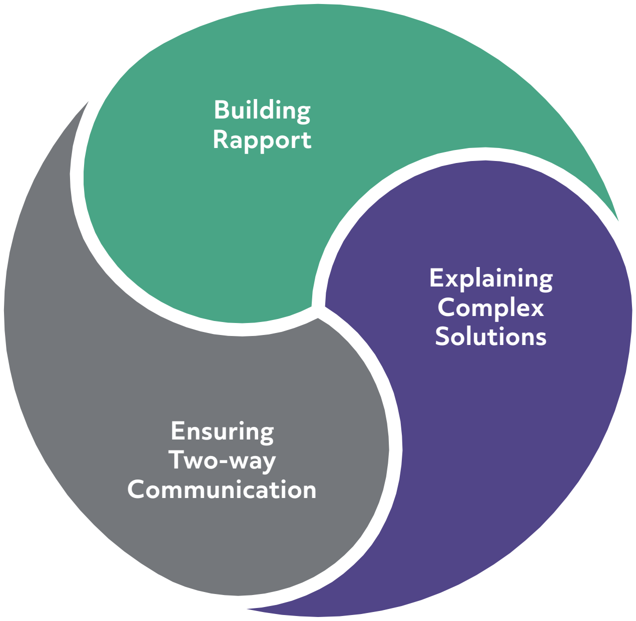
Key topics

- Network Mapping
- Advice for virtual selling pitfalls
- Ladder of Inference
- Virtual meeting facilitation best practices

Effective Virtual Group Facilitation



Challenges of Virtual Selling



Influence, Persuasion, and Stakeholder Management

Most people think of influence as getting others to agree; we guide participants to recognize influence as a two-way street, to become curious about different viewpoints, and to seek to understand the reasons for resistance. This course will enable salespeople to deliver results that require cooperation and buy-in from others, both internally and at customers, using advanced influence strategies and stakeholder alignment techniques.

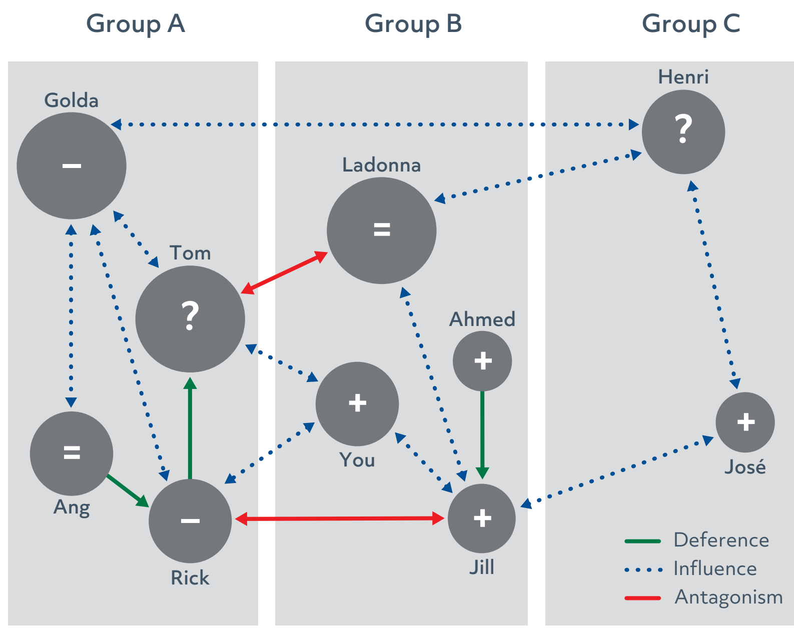
Learning objectives

- Help salespeople move beyond "handling" objections to constructively engage, learn from, and overcome resistance
- Enhance the ability of salespeople to employ psychological, emotional, and relational sources of influence
- Enhance ability to communicate ideas and recommendations persuasively
- Equip salespeople with strategies for building, expanding , and sustaining a powerful network of allies and influencer's within customer accounts

Key topics

- Stakeholder Mapping
- Overcoming resistance
- Dealing with conflicting perceptions
- Constructively managing emotional resistance
- Building multi-party alignment

Stakeholder and Influence Mapping



Currently Perceived Choice Chart

WHO am I trying to influence? ______________________

WHAT do they likely hear me asking or proposing? ______________________

Perceived Consequences	
What they expect if they agree?	*What they expect if they disagree?*
–	+
–	+
–	+
–	+
–	+
BUT	BUT
+	–
+	–

Customer Negotiation: Strategies and Skills

Sales professionals negotiate constantly — with customer counterparts, with colleagues and teammates, and with internal business partners and stakeholders. This course is based on the principled, interest-based negotiation framework originally developed at Harvard. Through realistic simulations and industry-specific sales case studies, participants learn to take their negotiation skills to the next level and enhance effectiveness in a broad range of situations.

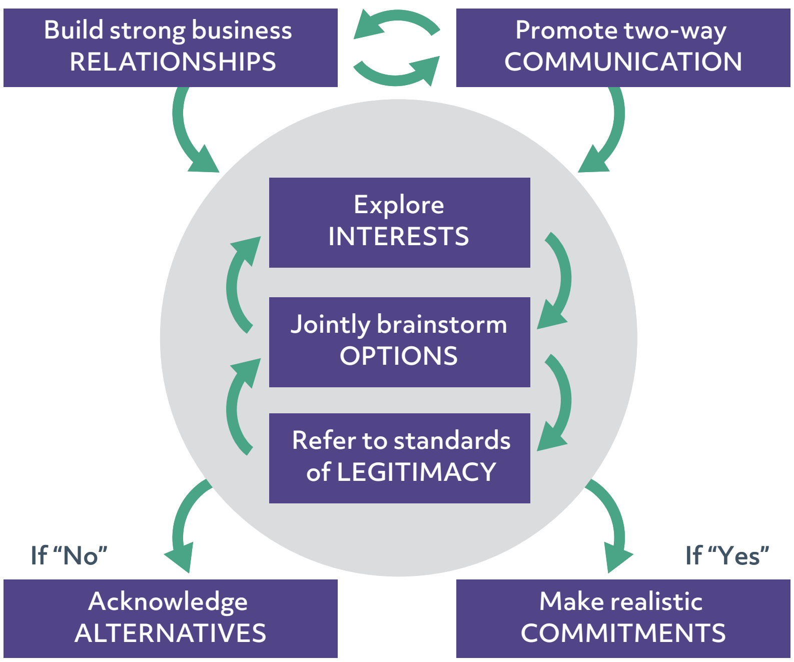
Learning objectives

- Learn to negotiate with customers strategically, not reactively
- Understand how to negotiate assertively without damaging your customers relationships
- Implement strategies to to separate customer demands from their underlying interests
- Identify, explore, and handle customer concerns and objections, constructively
- Understand why and how to analyze the relative strength of competitor offerings and the customers best alternative to Negotiated Agreement (BATNA)
- Identify and employ multiple sources of negotiation leverage
- Analyze and effectively respond to difficult customer tactics

Key topics

- The Seven Elements of Negotiation
- Case study preparation, role play, and debrief
- Dealing with difficult tactics: Spotting and changing the game
- Application session and/or strategy development

Circle of Value



Handling Customer Negotiation Tactics

- **Avoid reacting** — go to the "balcony"
- **Diagnose** the behavior
- **Add elements** missing from the discussion
- **Reframe** other elements in more constructive directions
- Negotiate explicitly over the "**rules**"
- **Change the players** (adding, subtracting, or replacing)
- Know your **BATNA** and be prepared to use it

Building Sustainable Customer Relationships

Business ultimately depends on people and the relationships between them. This workshop will equip participants with systematic approaches and skills to build and maintain positive customer relationships — maximizing business results as a collaborative contributor and valued partner. In this workshop, participants have an opportunity to explore their individual relationship management style, before learning to adapt that style to the customers they work with.

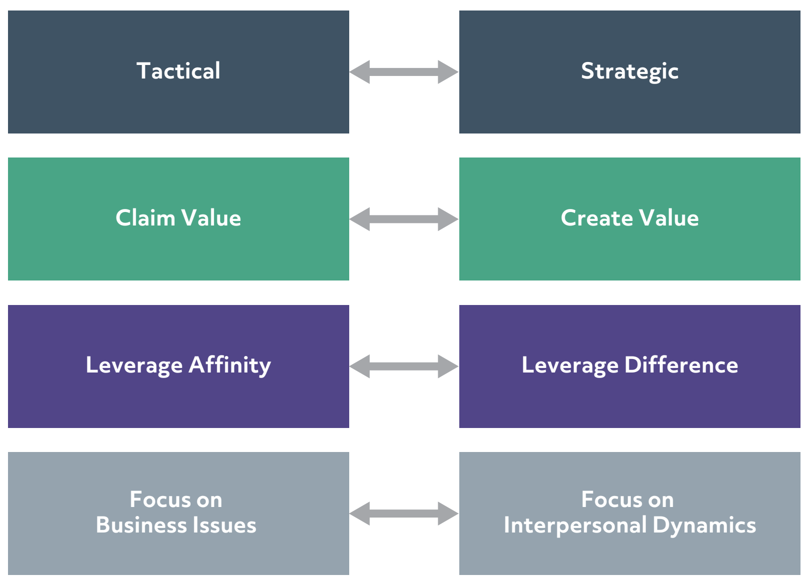
Learning objectives

- Understand the importance of trust and how to build with your customers
- Manage customer conflict constructively and with confidence
- Understand the importance of effective communication in building relationships with your customers
- Build better working relationships with customers who have different objectives, priorities, and perspectives
- Implement the power of fairness to create win-win outcomes and build trust and commitment
- Recognizing the importance of emotions in building trusting relationships

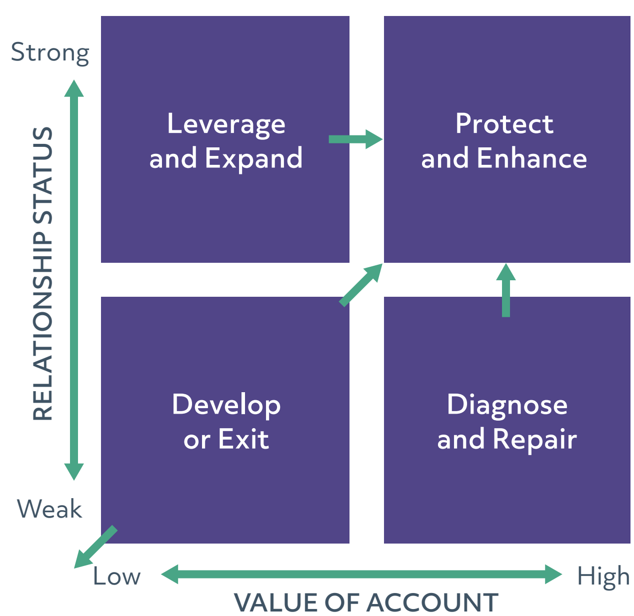
Key topics

- Overcoming objections
- Defining and establishing trust
- Connecting with customers
- Influencing customers
- Asking the right questions
- Establishing a customer engagement cadence
- Building a relationship management plan
- Managing conflict with customers

Relationship Management Styles



Customer Segmentation Tool



Becoming a Trusted Advisor

Establishing a trusted advisor relationship with customers is essential to uncovering new opportunities, increasing win-rates, and delivering greater value to customers. But building trust and becoming an indispensable advisor to a customer (and to individuals within an account) is challenging, and not without risk. This workshop equips participants with tools and skills to go beyond selling and build valuable, sustainable, and authentic relationships with customers.

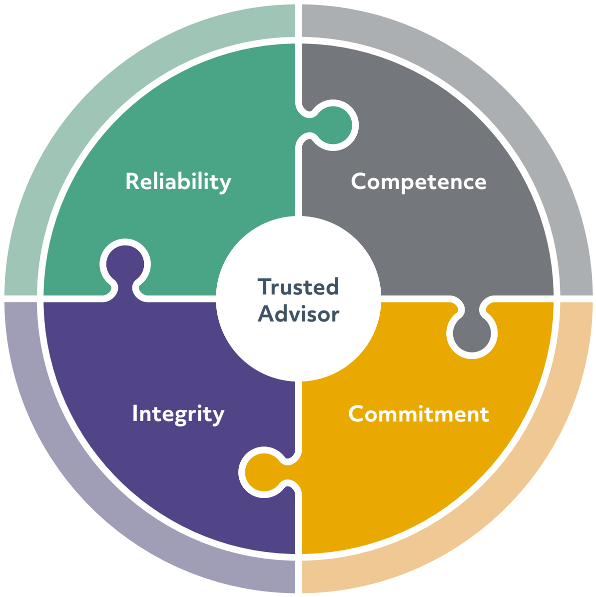
Learning objectives

- Understand how to establish trusted advisor relationships with customers
- Learn practical techniques to build, sustain, and when necessary, repair trust
- Enhance ability to deliver valuable insights to customers in a range of situations
- Enhance ability to collaborate with customers in the face of conflicting objectives, priorities, and perspectives

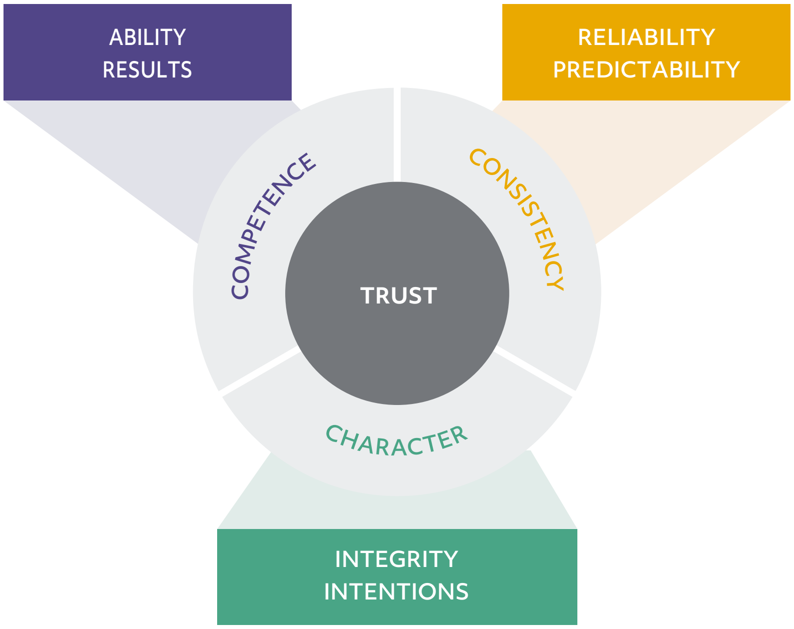
Key topics

- Defining trust
- Assessing earned trust
- Operationalizing trust: Building, sustaining, and restoring trust
- Attributes of a trusted advisor
- Enhancing the quality of trust in a relationship

Trusted Advisor Model



Defining Trust



Adapted from Stephen M.R. Covey

Emotional Intelligence for Sales

In today's complex sales environment, salespeople are expected to do more than show subject matter expertise. To successfully navigate customer accounts they must demonstrate emotional intelligence to adapt to the preferences and working styles of their customers. Participants will learn how to read emotional cues and adapt to their customer's needs in an agile fashion. This workshop will hone their ability to connect with, influence, and collaborate with customers and internal stakeholders leveraging an EQ self-assessment, frameworks, and tools introduced in the course.

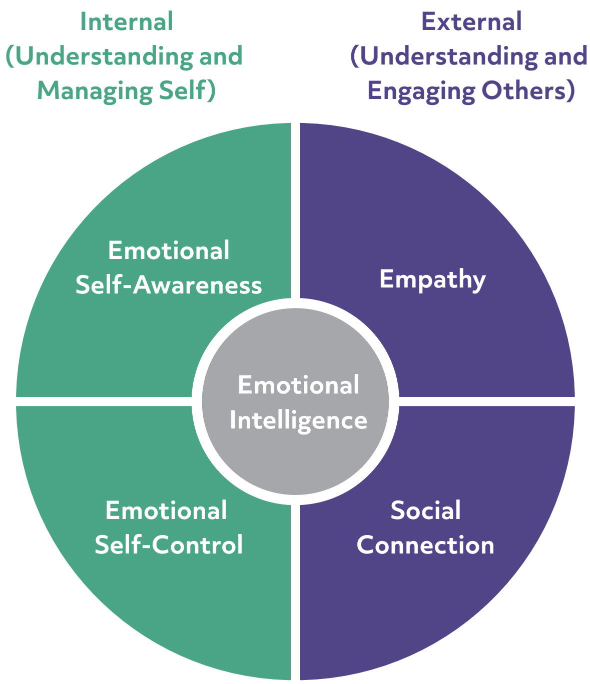
Learning objectives

- Enhance self-awareness and emotional self-control to improve interpersonal effectiveness
- Increase ability to build meaningful connections with colleagues and customers
- Leverage empathy to better understand the experiences and perspectives of colleagues and customers
- Using DiSC framework to enhance self-awareness and manage relationships
- Apply practical techniques for building, sustaining, and when necessary, rebuilding trust

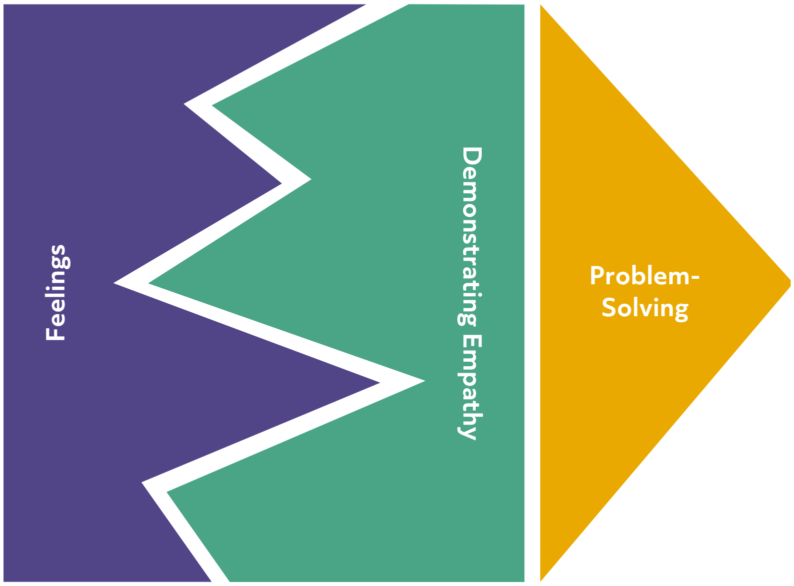
Key topics

- Enhance self-awareness and emotional self-control to improve
- Emotional Intelligence self-assessment and framework
- Building self-awareness and self-control
- Empathy and managing strong emotions Building social connections and social capital
- Instilling trust

Emotional Intelligence Framework



Empathy — the Bridge to Problem-solving



Extraordinary Customer Presentations and Pitches

Decision makers rely on people they trust. In business, time is a precious commodity. Decision makers are constantly stretched. Individuals leading meetings, or any communication, need to resonate quickly, provide precise information that focuses on the decision makers' needs, and then leave with actionable next steps. In this course, learners gain the skills to create and lead memorable and actionable customer presentations and meetings that make a lasting and positive impact.

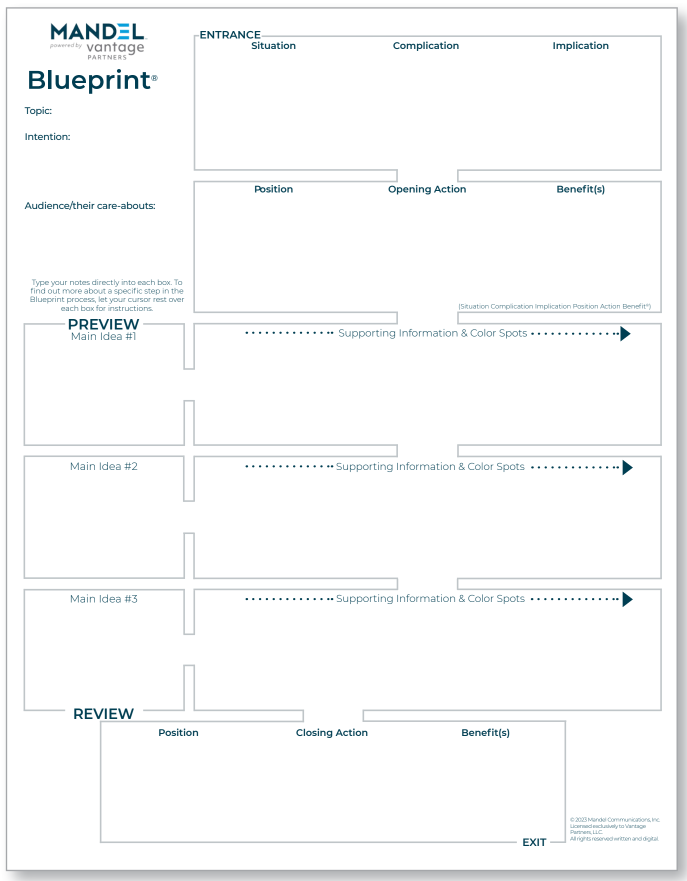
Learning objectives

- Understand what it takes to truly "be heard," whenever you are communicating to customers
- Analyze and anticipate your customer's needs and anticipate their needs
- Develop and deliver customer-centric pitches that instantly resonate
- Distill the agenda to three main ideas that enable action to move the sale forward
- Overcome tough questions and objections with confidence
- Practice the critical delivery skills to demonstrate executive presence
- Close with a compelling action

Key topics

- Personal communication framework
- Mandel Blueprint
- Skill practices and coaching labs
- Customer presentation simulations
- Models for handling customer objections

Mandel Blueprint®



Data and Analytics-Driven Storytelling

Today's leaders are confronted with a myriad of data sources. This data overload often leaves salespeople, leaders, and managers struggling to know where to start in conveying complex information with purpose, and in an influential way. Without a story, your message feels incomplete. No matter how solid your strategy or how compelling the numbers, failing to deliver your message in the context of a story and your audience won't see its value. But put your message in the context of a story? Suddenly, differentiators come to life. Buyers see themselves reflected. Decision-makers gain the confidence to say "yes." In this workshop, participants learn how to sort through the data to create and tell impactful stories to gain alignment and move their sale forward.

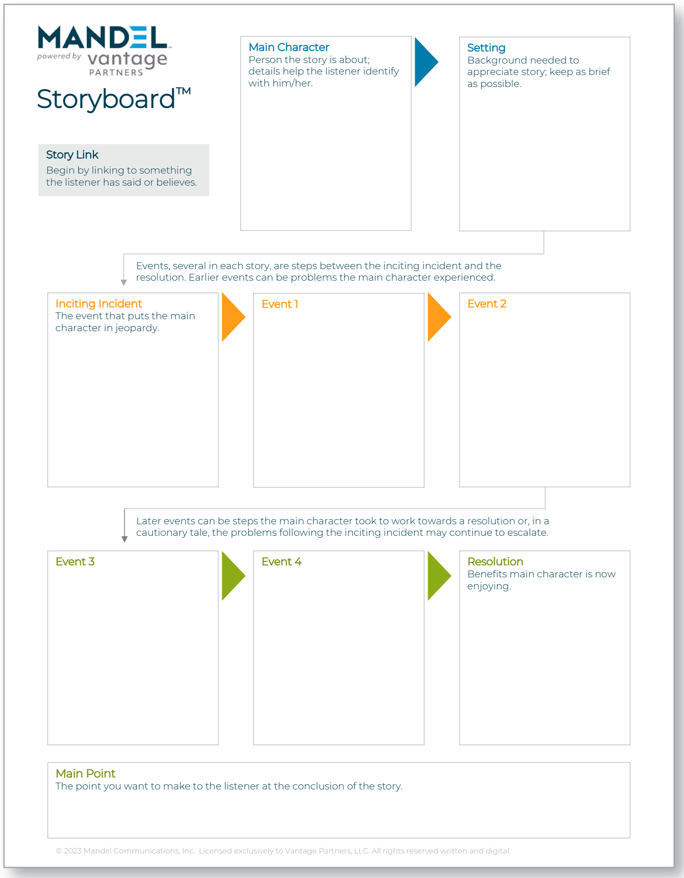
Learning objectives

- Craft compelling data-driven stories based on an understanding of the audience's needs and challenges
- Understand what data is "of value" to your audience and what the audience needs to understand in order to move your idea or proposal forward
- Learn how to plan for meetings and presentations, enabled by scenario-driven and real-world application and practice
- Skillfully use data to provide answers to specific questions
- Apply data visualization and storytelling techniques to present data and insights to customers in compelling ways

Key topics

- Personal communication framework
- Mandel Blueprint
- Video exercises
- Presentation simulations
- Data visualization practice

Mandel Storyboard™



Difficult Customer Conversations

Having tough conversations with customers — about price, contract terms, performance, customer demands, or timelines are inevitable. When not handled well, the costs can be high. Although the topics themselves may be inherently challenging, when we address them skillfully, they can be powerful opportunities to strengthen working relationships and achieve better business results. This workshop is based on Vantage's best-selling book Difficult Conversations: How to Discuss What Matters Most, will help you transform conflict with customers into shared understanding and improved relationships.

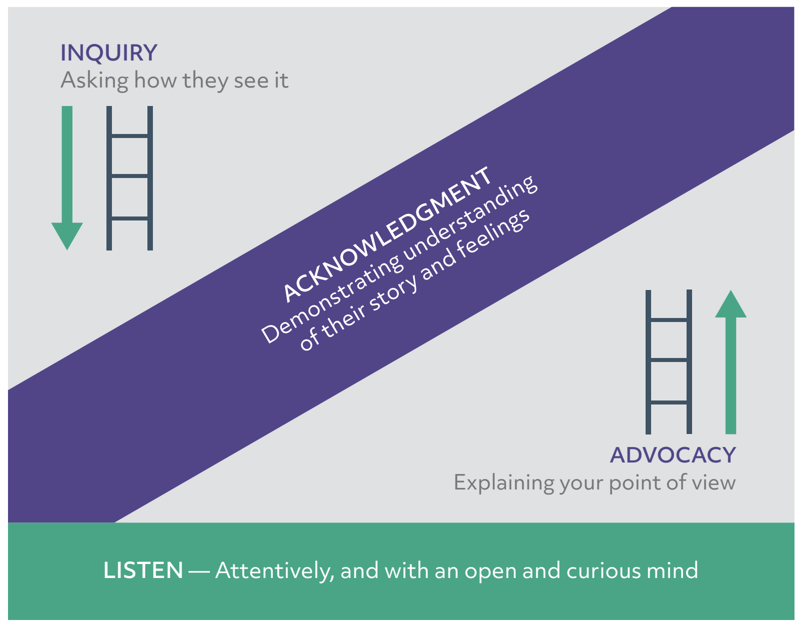
Learning objectives

- Enable individuals and organizations to leverage interpersonal skills for improved business results and customer relationships
- Communicate effectively with customers in the face of disagreement, conflict and strong emotions
- Learn to empathize with customers' strong feelings, even while continuing to disagree with the other person's point of view
- Apply the Five Key Shifts in Thinking to diagnose unproductive thinking and strategize about how to change it

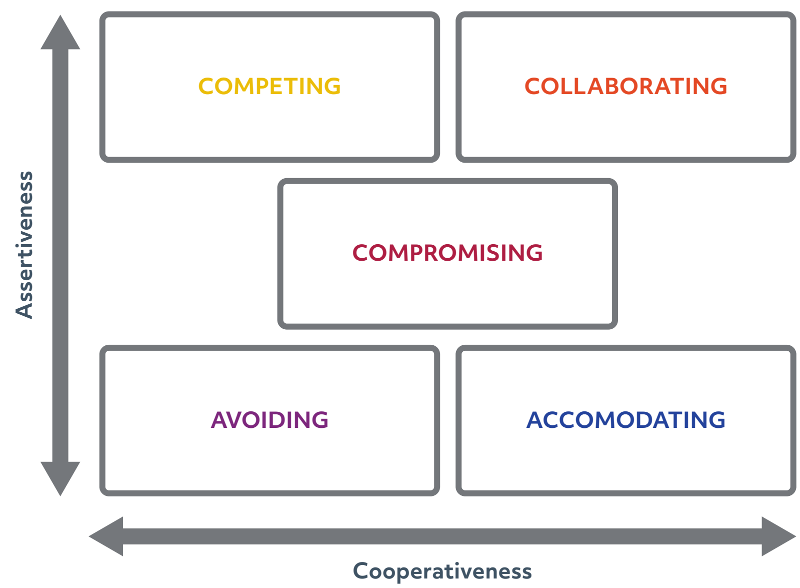
Key topics

- Managing your Internal Voice
- Difficult conversation role play
- Scenario practice
- Defining difficult conversations

Key Communication Skills



Five Modes of Conflict Management



Structured Communication

Clearly and persuasively explaining complex ideas to customers, internal colleagues, senior executives, and other stakeholders is a critical skill for all sales professionals. In this workshop, participants learn how to bring coherence to complex data and concepts, and deliver insights and recommendations tailored to the needs and expectations of their customers and pitch in a way that inspires action and commitment.

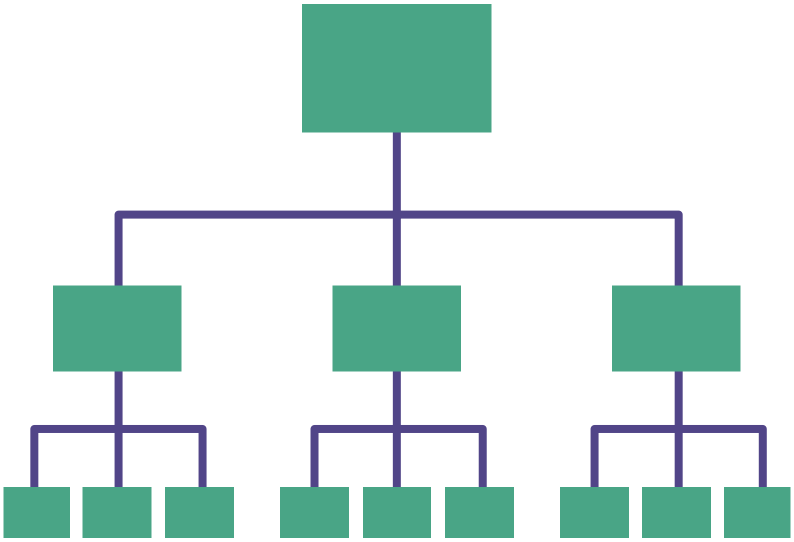
Learning objectives

- Enhance ability to communicate complex information and ideas in concise and compelling ways
- Raise awareness and deepen understanding of common communication pitfalls
- Learn how to analyze diverse customer needs in order to develop and convey an impactful message
- Improve ability to surface, diagnose, and constructively engage objections and resistance
- Develop immediately compelling and engaging pitches for complex solutions

Key topics

- The Hierarchy of Ideas
- Situation archetypes
- Communicating with purpose
- Presentation simulations
- Organizing complex data in a clear structure
- Managing objections

The Hierarchy of Ideas



Guidelines for Effective Communication

Clear	Communicate to audiences in their language. Avoid unfamiliar jargon. Be direct and avoid "spin."
Concise	Focus on what is important; don't reduce the impact of the main message; avoid distractions.
Contextualized	Provide background information and broader context as needed to help people fully understand explanations, advice, requests, assignments.
Consistent	Avoid mixed messages, and minimize periods of non-communication (when concerns are likely to arise and metastasize).
Coordinated	Get the right information and messages, to the right people, at the right time — from the right messengers.
Constructive	Plan and execute every communication deliberately to achieve a positive result (avoid defensiveness, venting, complaining, blaming, making excuses).

Executive Presence for Sales

There's no second chance to make a first impression. How you present yourself to your customers, to your colleagues, and to senior management can make all the difference. Key to this is understanding who you are and the executive presence you project to be perceived as authentic, trustworthy, and confident. In this workshop, we break down the components of executive presence and demonstrate how to "show up" in a way that conveys authority and confidence to both internal and customer stakeholders. We describe how to prepare for high-stakes meetings, how to anticipate challenging questions and how to arrange your pitches for maximum clarity and impact.

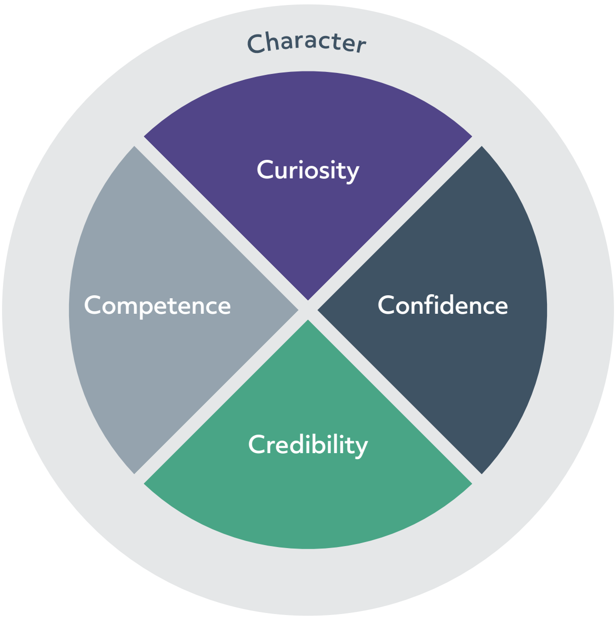
Learning objectives

- Demonstrate how to leverage the Five Cs of executive presence to communicate with customers and internal partners with impact
- Learn how measured body language, tone and delivery can instill confidence in customers and internal stakeholders
- Demonstrate how to anticipate questions and challenges so that learners can walk into a high stakes meeting prepared for success
- Learn to express curiosity and competence in exploring customer needs to build trust quickly
- Demonstrate how to organize thinking and presentations for clarity and maximum effect

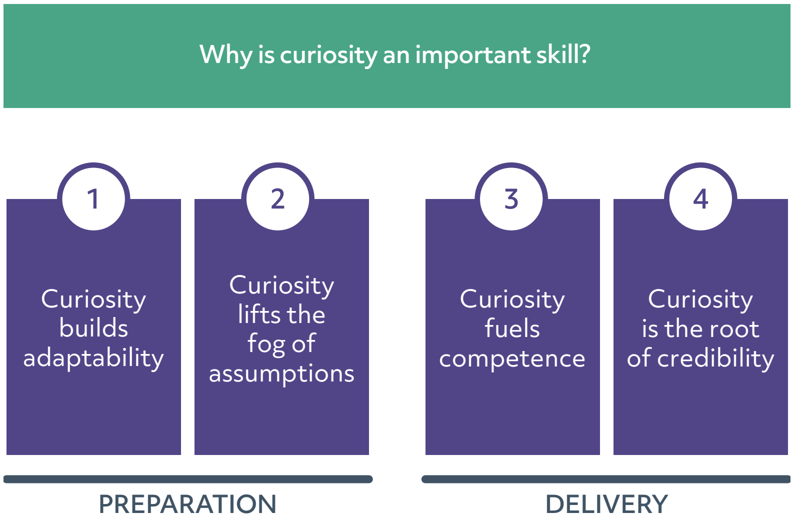
Key topics

- Video recording of presentations and analysis
- Communicating with purpose
- How to effectively answer questions

The Five Cs of Executive Presence



Getting Curious: Why?



Building Your Account Leadership Brand

As a sales leader you have your own leadership style. This course focuses on allowing sales leaders to identify the kind of leader they currently are and empowering them with the tools to identify and build the leadership brand they would like to have in the future. Sales leaders will consider their mission, vision, and personal values when developing a concrete action plan for enhancing their brands.

Learning objectives

- Build and leverage your leadership brand.
- Understand and activate in yourself the traits of true account leadership.
- Drive alignment and impact with and through others – even without formal authority.
- Maximize collaboration and credibility with internal partners and across your accounts to accelerate revenue growth and sustainability

Key topics

- Navigating the Storm: leadership video analysis
- Characteristics of high-performing teams
- D-I-C-N alignment tool
- Value card sorting exercise

Building a Leadership Brand

Developing a Leadership Brand

Leading Change and Transformation

Disruptive market dynamics and ever-shifting customer needs and challenges require sales and account teams to continuously navigate change, and often to initiate and lead change efforts of various kinds. This course covers pragmatic frameworks for responding to change and increasing individual resiliency — as well as catalyzing change, developing change plans, engaging stakeholders, and overcoming resistance to change. Through interactive exercises and realistic case studies, you will enhance your ability to both navigate and lead change in a broad range of sales and account management contexts.

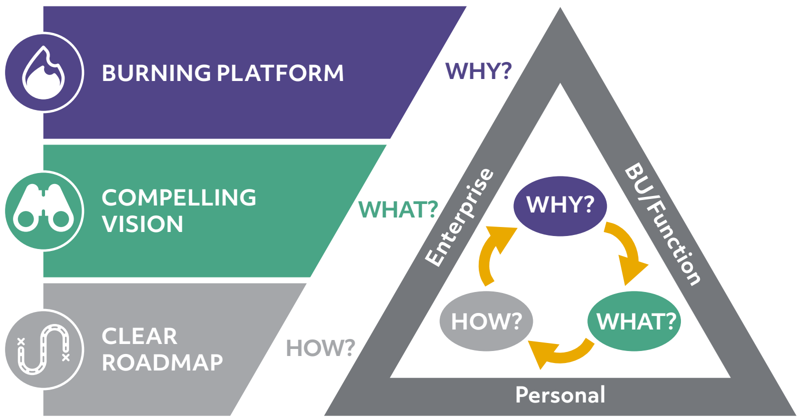
Learning objectives

- Apply strategies to navigate through an environment in which significant change is occurring
- Analyze and discuss reasons for organizational change or transformation
- Discuss strategies to increase personal resilience in times of change
- Implement practical approaches to deal with the difficult emotions encountered in times of change
- Engage resistant stakeholders, learn from them, and make them part of lasting change

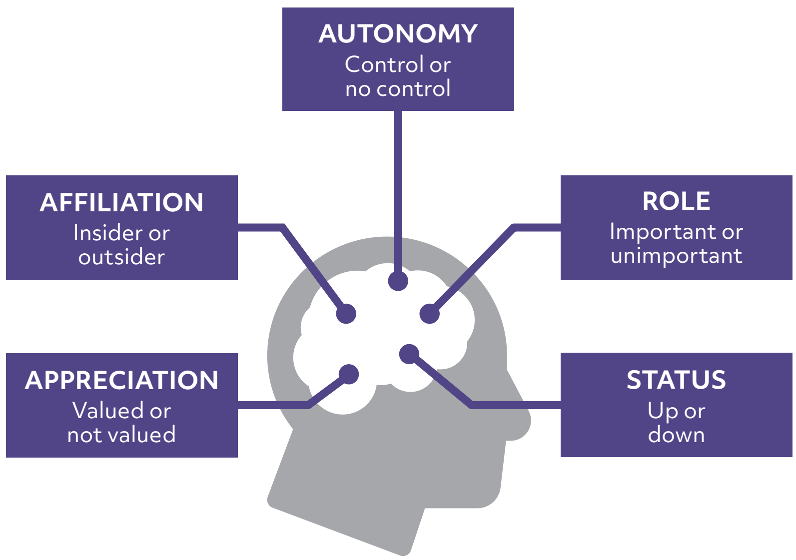
Key topics

- Understanding and navigating the transition process
- Diagnosing resistance to change
- Creating and selling the case for change
- Communicating a compelling future state vision
- Transforming resistance into engagement

Framework for Change



Five Core Concerns



Based on Fisher and Shapiro, *Beyond Reason: Emotions in Negotiation*.

Sales Leadership and Coaching

Sales leaders face many difficult challenges – from how to optimally collaborate with internal business partners, to how to allocate limited time to guide and coach their teams. This course equips both new and seasoned sales leaders with frameworks and tools to better understand, and expand, their individual leadership style, and enhance the effectiveness of their teams. Through interactive exercises and real-world application, participants enhance their ability to lead in a broad range of situations.

Learning objectives

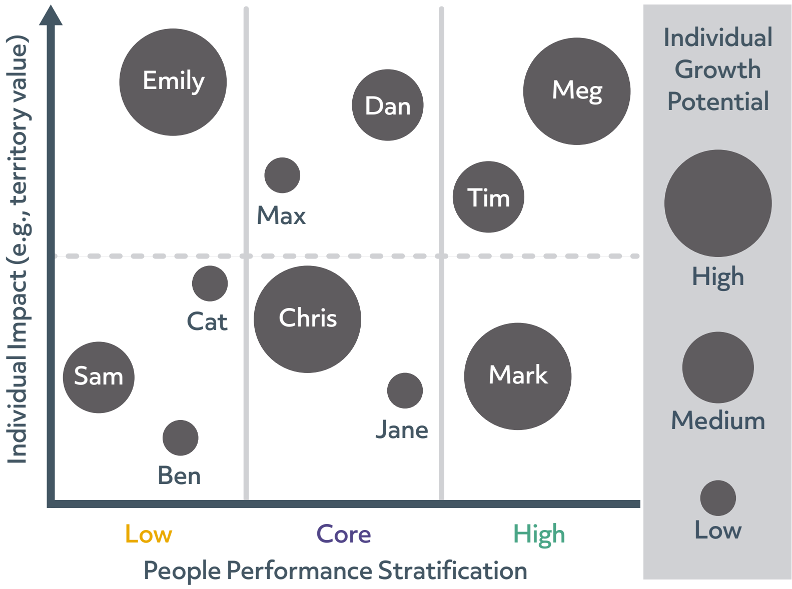
- How to assess the current level of capability and skill of your team
- How to build coaching plans that enable your team members to reach their full potential
- Assessing the overall performance potential of your team as a group to determine where and how to spend your time to maximize your team's effectiveness
- Learning how to deliver performance feedback that motivates and supports your team members development and success

Key topics

- Leading Self: Understanding your role as a sales leader, Self awareness, Personal energy and resilience, Growth mindset
- Leading Others: Motivating, coaching and inspiring people; Leading high-performing teams; Creating an inclusive environment; Prioritization, delegation, and managing commitments; performance management
- Leading the Business: Delivering results; Creating a culture of accountability; Decision-making; Smart risks and productive failures; The agile and adaptive sales leader

A⁴ Coaching Tool

People Performance Stratification Mapping



Business Territory and Planning for Sales

Salespeople are constantly pulled in multiple directions as they uncover new opportunities and address their customers' needs. Given the constant barrage of sales tasks, it is hard to know where and how salespeople should prioritize their time to maximize revenue generation. Vantage's Business Planning and Targeting course enables salespeople to efficiently leverage the data they have available on their territory, customers, and competitors to build a winning territory strategy to overcome obstacles, accelerate revenue growth, drive customer success, and exceed quota.

Learning objectives

- Use data to develop territory plans based on the individual customers that each rep works with
- Understand each of the various data sources that reps have at their disposal, and how to use them in managing their time and energy strategically
- Build skills in being able to both pull big picture insights from data, while also being able to skillfully use data to find answers to highly specific questions
- Review data from multiple angles, while avoiding the threat of cognitive biases
- Profile customers to enable efficient allocation of time and resources

Key topics

- Ladder of Inference
- Account dashboard analysis
- Customer segmentation tool
- GAMeD Planning tool to build territory plans

Taking a data-driven approach to your territory

G

GATHER data that will guide your focus

P

PRIORITIZE where and how you can have the most impact

S

STRATEGIZE how you will grow your territory

GAMeD Planning Tool

Goals
The desired outcome we want to meet our territory performance objectives

Activities
The specific actions we take to achieve our goals

Metrics
How we will evaluate our progress in achieving our goals and activities

Date
The specific time by which we will complete our activities

Strategic Thinking for Sales

Account Managers, because they sit at the nexus of two companies — their own and their customer's— are constantly pulled in multiple, often conflicting directions. It's easy to be consumed by urgent opportunities and challenges — to the detriment of thinking and operating in a fully strategic way. This requires thinking more broadly and deeply about problems and their causes, about opportunities, and about the broad and complex business landscape in which customers operate. This course provides practical frameworks and tools to enhance participants' ability to think like senior business leaders, build credibility with customer executives and provide strategic insights with confidence.

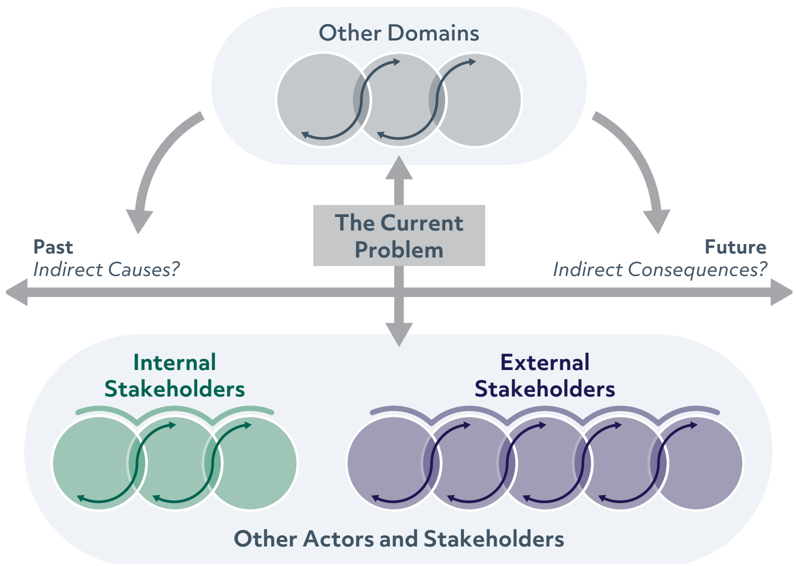
Learning objectives

- Use big picture thinking to "connect the dots" and identify non-obvious risks and opportunities
- Profile and segment customers to enable strategic and efficient allocation of time and resources
- Understand key accounts at a deeper and more strategic level
- Uncover creative sources of value for you and your customers
- Develop and frame solutions in ways that directly speak to customers needs and interests
- Convert insight to action

Key topics

- Big Picture Thinking
- Value Chain Analysis
- Systems thinking to analyze complex issues
- Risk mapping

Big Picture Thinking



Value Chain Analysis

Partner Assets and Capabilities	Where does this partner currently provide solutions within the end-customer's value chain?
Value Chain of Customers Served by the Partnership	Build → Market → Sell → Distribute → Service Support
Our Assets and Capabilities	Where does our company currently provide solutions within the end-customer's value chain?
Partnering Opportunities	■ Where is there currently opportunity to reduce cost, increase velocity, and/or add value in the end-customer's value chain that we cannot address on our own? ■ How can we link or integrate the partner's solutions, and ours, to create a more comprehensive solution for the end-customer — to increase value to them and/or our pricing power? ■ How can we combine our assets and capabilities with those of the partner to provide a compelling solution to an unaddressed problem or opportunity for the end-customer?