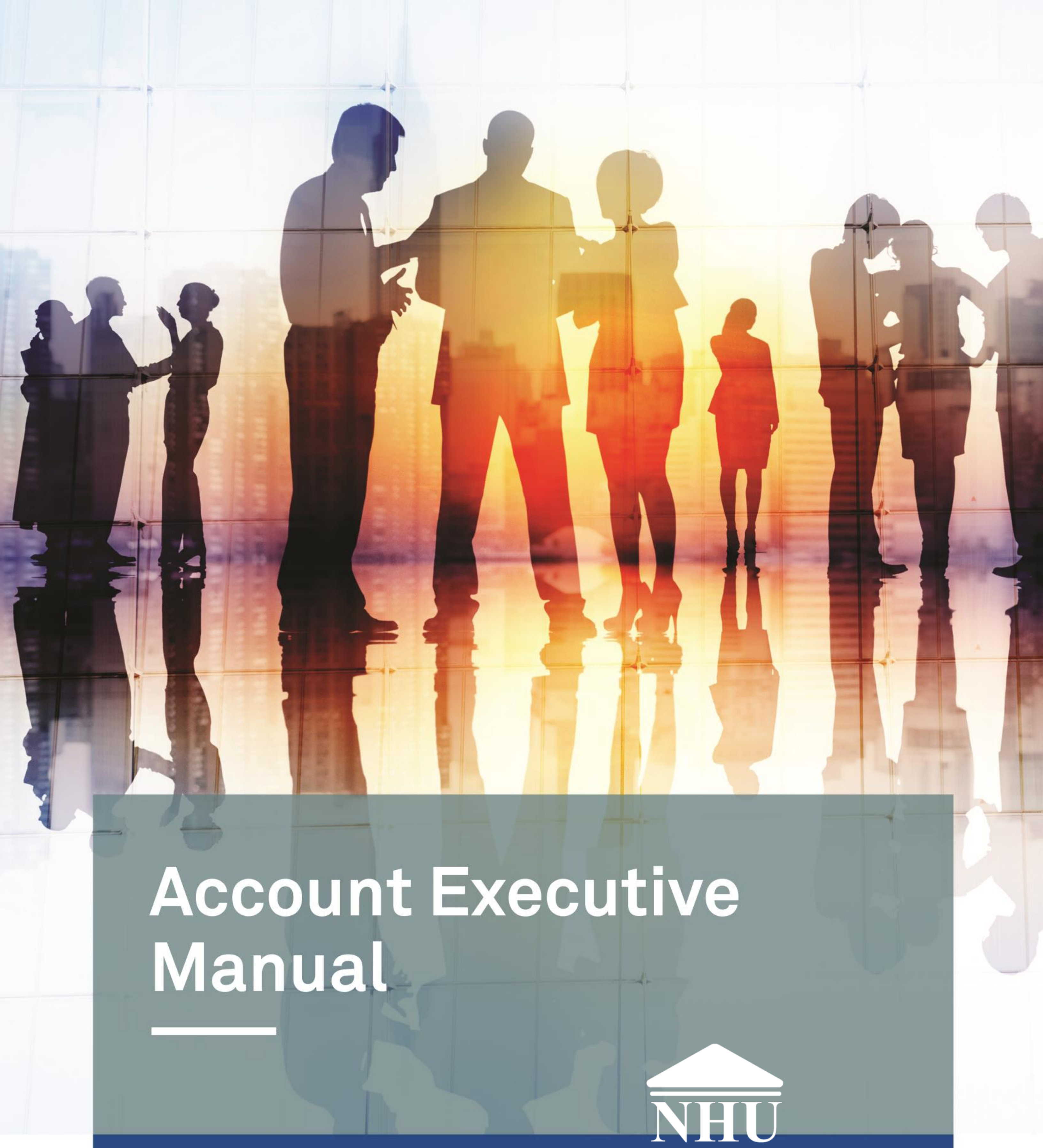

Account Executive Manual

NHU
New Horizons University

New Horizons®
Computer Learning Centers

www.newhorizons.com

Revision Schedule

Version	Date	Author	Change
Rev2010	*Jan, 2010*	*NHU*	***Major Revision*** *Restructure of content organization, addition of graphics to represent core concepts, and update of appendices to support current best practices.*
	Mar, 2010	*NHU*	*Incorporated edits provided by Network steering committee. Added chapter on basic Learning Solutions.*
	September2016	*NHU*	*Revised Cover*

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Account Executive Role

Contents

Preface

Congratulations on your selection as an Account Executive for New Horizons Computer Learning Centers. This manual will serve as your primary reference resource and your guide to accumulating personal wealth.

New Horizons Computer Learning Centers, Inc. has a proven Sales System that has flourished in the Computer Training Industry. Your primary responsibility is to generate sales at your location by following the established Sales System. This manual explains this system in detail, and teaches you how to execute each corresponding element.

Chapter 1 Introduction

With over 300 centers in over 60 countries, New Horizons is the world's largest independent IT training company. We deliver a full range of technology and business skills training from basic application and desktop productivity tools to complex and integrated business systems. For more than 25 years, we have provided innovative learning solutions that have transformed businesses and helped over 25 million students improve their skill sets. We continue to expand our offerings, locations, and solutions to meet the growing demands placed on organizations and their employees.

Your position as an Account Executive is critical to our continued success. You are the sales engine that creates demand for our training solutions. You are the first point of contact with a potential client and are responsible for maintaining the relationship with clients on behalf of your center. Your job is to continuously search for new business opportunities both within your current and external to your account base. You earn commission as you collect payment from these accounts.

Your Sales Manager is both your primary resource and direct supervisor. Sales Manager compensation is based on the level of sales and collections the company generates. Therefore, they have a vested interest in the performance of their Account Executives. It is their duty to capture all of the business in their market. Because of this, they will train you on the Sales System, provide you with leads, assist you in sales proposals, coach you on closing sales, and demand that you maximize the opportunities in every account.

This manual is a resource for you to succeed in your position. It is not a substitute for training. In order to acquire the skills and knowledge necessary to execute The Sales Process, you will need to attend the appropriate training as defined by the Sales Manager.

Section 1.1 Job Description

Section Key Terms

Consultative Selling	*Selling that involves understanding customer issues and problems, and asking questions that can help to foresee challenges that the buyer may encounter.*
Collections	*Money collected from client for the delivery of services within a given time range or duration from date of sale.*
Commissionable Collections	*The total collected amount less predetermined costs of delivery; such as contracted instructors, travel, or interfranchise delivery fees.*
Accounts Receivable (AR)	*Outstanding amount owed for invoiced services.*
Aging	*The number of days an invoice has gone without being collected.*

1.1.1 Basic Function

Your primary job function is to meet or exceed sales goals for an assigned portfolio of accounts by promoting and selling training services through professional, consultative sales techniques and long-term relationships.

Reference **Appendix 1** for your **Daily Flow Chart Activities**.

1.1.2 Position Qualifications

Skills

Basic selling skills: Establishes rapport, determines customer needs, relates benefits to product features, handles objections, and closes

Strategic selling skills: Listens beyond product needs and establishes a vision of a client-vendor relationship that supports the strategic direction of both organizations

Consulting skills: Involves others in decisions that will affect them, encourages participation of key stakeholders in problem solving, and develops breakthrough ideas and solutions

Problem-solving skills: Anticipates problems, invites ideas, and distinguishes symptoms from causes, modifies proposals, and implements solutions.

Knowledge

Financial analysis: Understands the financial impact of decisions on the client, the client's customer, and New Horizons

Market analysis: Understands market trends and the implications of those trends for the industry, customers, markets and the competition

Business planning: Understands the factors that affect an industry's potential for profitability, growth, a company's competitive position, and how this information is used to determine the strategic direction and annual business plan for the company

Computer literacy: Has basic computer skills including, Microsoft Excel, Word, PowerPoint and Outlook. These skills are necessary for prospecting and marketing training solutions, including customer contact and customer management

Product Knowledge: Possesses expertise related to New Horizon's products and services as well as crucial aspects of the business

1.1.3 Account Executive Career Path

Account Executives are categorized as Level I, Level II or Senior Account Executive. Your career at New Horizons will evolve from Level I to Level II, with the possible outcome of attaining Senior status. These categories are distinguished specifically by the amount of collections generated. New Account Executives naturally spend the beginning of their career at New Horizons learning and becoming comfortable with the Sales System and the vast array of training solutions offered.

Typically, a new Account Executive focuses on selling instructor-led applications classes while learning about, and developing the skills necessary to sell more in-depth training offerings and delivery methods such as technical certifications and Mentored Learning. New Account Executives concentrate heavily on cold calling to develop and grow your database. As you move to Level II and to Senior status, your focus on cold calls will change slightly and you will begin to develop new business by penetrating existing accounts and getting referrals from existing clients. As a Level II or Senior Account Executive, the same standard of generating a specific level of new business each day will still apply, the difference being that you will often generate this business in different ways other than exclusively making initial calls. The primary way you will generate new business is through penetrating existing accounts and receiving referrals. The Account Executive commission structure is what most distinguishes the various levels of Account Executives.

1.1.4 Account Executive Commission Structure

Account Executive commission structures vary by center, mainly because of variations in labor laws. Your Sales Manager will provide you with a copy of your specific commission structure.

There are three components to Account Executive compensation:

- **Base Salary**
- **Commission**
  - Percentage of collections (money collected for the sale of services) minus the cost of delivery. The cost of delivery can include interfranchise delivery fees, materials fees, contract trainer costs, travel expenses, or other costs incurred to deliver the training you sold.
- **Bonus**
  - Monthly or quarterly performance incentives.

Here is a basic compensation structure by career level:

Career Level	Compensation
Account Executive- Level I	Base salary + Commission + Bonus
Account Executive- Level II	Commission + Bonus
Senior	Commission + Senior Commission + Bonus

All new business-to-business sales people start as Account Executive Level I. Initially, you will receive a base salary plus a modest commission. We have designed the compensation structure for the Level I's to assist you financially during the period of time that you are building the collection totals from your new portfolio of accounts. You are expected to quickly begin to grow the collections from your portfolio to a size that can sustain you.

Minimum Sales and Collections Standards

Your commission plan will detail specific monthly minimum sales and collections standards that must be met. These standards increase from your start date to a point in time at which they will remain at a constant level. The following is a sample of the minimum sales and collections standards for an Account Executive.

Level I Account Executive

MONTH	SALES	COLLECTIONS
1	$2,000[1]	$0
2	$4,000	$2,000
3	$6,000	$4,000
4	$8,000	$6,000
5	$11,000	$8,000
6	$14,000	$11,000
7	$17,000	$14,000
8	$20,000	$17,000
9+	$20,000	$20,000

Level II Account Executive

MONTH	SALES	COLLECTIONS
9+	$20,000	$20,000

While aptitude, attitude, and an ability to follow the system are key ingredients in your overall performance, the final determination of your employment is your skill in generating sales and collections.

An Account Executive who fails to meet minimum standards in any month will be placed on a probation status. This probation will be communicated in writing and kept as part of the Account Executive's personnel file. Once on probation, the Account Executive may be subject to a weekly minimum of sales and collections. This weekly minimum provides the Account Executive with specific goals and can be used to begin termination procedures if necessary. If minimums are not met for two consecutive months, the probation period ends with termination.

[1] *Any reference to the US dollar should be substituted with an equivalent amount in your local currency.*

Account Executives may receive their base salary through nine months or the period defined in their commission plan. Account Executives may choose to move to a Level II commission-only basis at any time before that time. However, once the decision is made to move to commission-only, returning to a base salary/smaller commission is not permitted. Therefore, the decision to move to Level II full commission should be carefully thought out and discussed with a Sales Manager. The basic elements of the commission structure are as follows.

Level I: Salary plus Commission

All newly hired Account Executives will earn a base salary plus a small additional commission on all commissionable collections if $10,000 or more is collected, (excluding non-commissionable expenses). Commission is paid on the entire collected amount, applying to all commissionable collections. The following is a sample of this policy:

Commissionable Collections	Additional Commission Rate
$0 to $9,999[2]	0%
$10,000 to $39,999	3% of all commissionable collections, starting with $1
$40,000 to $59,999	5%, starting with $1
$60,000 and above	6%, starting with $1

Level II: Commission-Only.

An Account Executive on Level II status earns substantially higher commissions than the Level One Account Executive. The commission rate earned increases as commissionable collections increase. The following is a sample of commissionable collections and the applicable commission rate:

Commissionable Collections	Additional Commission Rate
$0 to $9,999	0%
$10,000 to $19,999	5%, starting with $1
$20,00 to $29,999	10%, starting with $1
$30,000 to $39,999	13%, starting with $1
$40,000 and above	15%, starting with $1

[2] *Any reference to the US dollar should be substituted with an equivalent amount in your local currency.*

Senior Account Executive Status

When an Account Executive reaches a collections level roughly equivalent to 1,200 days of training[3] or as specified in his or her commission plan during a calendar year[4] an additional commission premium will be earned for the remainder of the year. Beginning in the month in which the specified collections level was reached. For commission purposes, Senior Account Executive status is earned on a yearly basis.

Senior Account Executives

The position of Senior Account Executive is an earned distinction. Though similar to that of the Level II Account Executive, it is distinct in that the Senior Account Executive has proved an ability to collect a set requirement of collections. When an Account Executive reaches $340,000 in collections, excluding non-commissionable expenses, during a calendar year (i.e. approximately December 21 through December 20) the Account Executive receives an additional 1% commission ("Senior Premium") for the remainder of the year, beginning in the month in which the $340,000 level was reached. Senior status resets each year.

A Senior Account Executive generally has a more mature database and receives the benefits of repeat business, account penetration, and an established referral base.

President's Club

Also known as the ***Million Dollar AE Award***, this honor goes to the "best of the best" salespersons in our network that collected at least $1 Million in the United States, or the local country equivalent.

To be eligible for the President's Club, an individual must:

- Collect at least $1 Million or the local country equivalents for the 12 months ending June of each year.
- Live the New Horizons Mission and operate with a commitment to the New Horizons Values.
- Be responsible for an individual sales quota. (Sales Managers, Sales Supervisors or those who have sales personnel reporting to them are ineligible for this award).

All Presidents' Club winners are invited to walk across the stage and be recognized at the annual International Conference.

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3 In the United States this is roughly $340,000 a year.
4 Approximately December 21 through December 20 due to the accounting closing nuances

1.1.5 Past Due Accounts

Collections are your responsibility. Your compensation is based on it. This is to encourage you to collect your accounts receivable balance as quickly as possible. We will not deviate from these established guidelines. The following is the commission policy on aging accounts.

Account Executives will receive 60% of their normal commission on collections received greater than 60 days but less than 91 days from the invoice aging date. No commission will be earned on collections received over 90 days from the invoice aging date. Collections of over 60 day receivables will not be included in either the monthly commission rate or the quarterly goal calculations.

For purposes of this commission calculation, commissionable collections for all city, county, state and federal government agencies will qualify for full commission and full goal/commission rate credit up to 90 days from the aging date. Collections of all city, county, state, and federal government agency receivables over 90 days will not be included in either the monthly commission rate or the quarterly goal calculations, and no commission will be earned.

1.1.6 Reporting Relationships

Subordinate Relationship

Sales Manager

Your Sales Manager is your supervisor and has a direct desire to see you succeed. They will assure you are trained on the Selling System, provide you with leads, assist with sales proposals, coach you through the Selling Framework, and help you maximize the opportunities in every account in your portfolio. They will observe and participate constructively on your growth and on your behaviors.

Direct Supervisory Relationship

Assigned Sales Assistants

A Sales Assistant is a sales support person assigned to one or more Account Executives, helping them with paperwork and other administrative tasks. In most centers, Senior Account Executives share the management of Sales Assistants, but at times there may be a one-to-one relationship.

Section 1.2 Your Organization – The Center

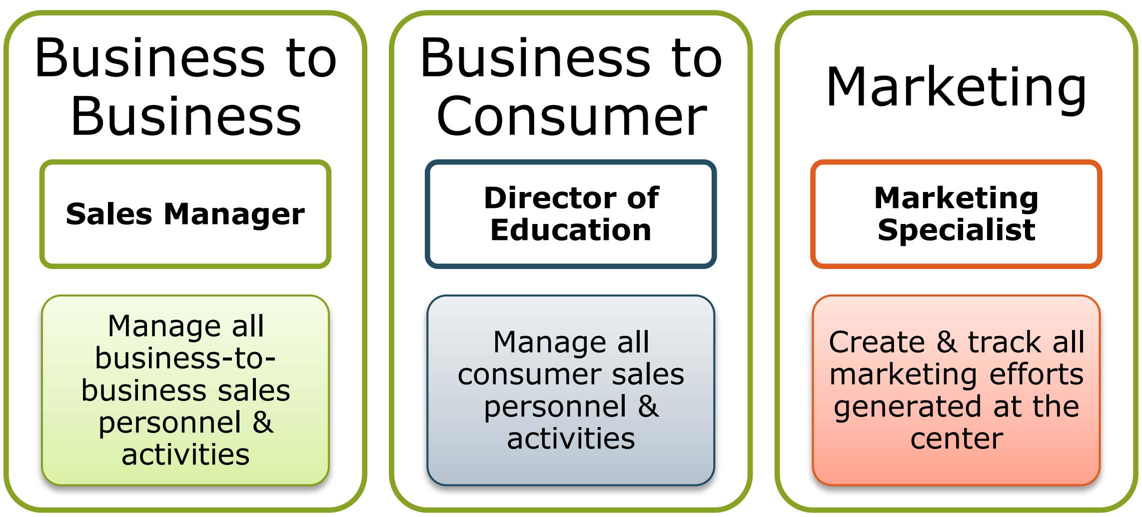
Section Key Term

Center	*A New Horizons Computer Learning Center, as defined by a franchise territory agreement. A physical location where the sale and delivery of New Horizons training takes place.*

Each center will have its own organizational structure, however there are three standard business units that exist within New Horizons: Sales, Delivery, and Administration. In larger centers, these units might be broken into further divisions such as Training, Customer Service, Marketing, etc. Each business unit may contain one or more departments and department heads. Your Sales Manager can supply you with your center's organizational chart and the names of your department heads.

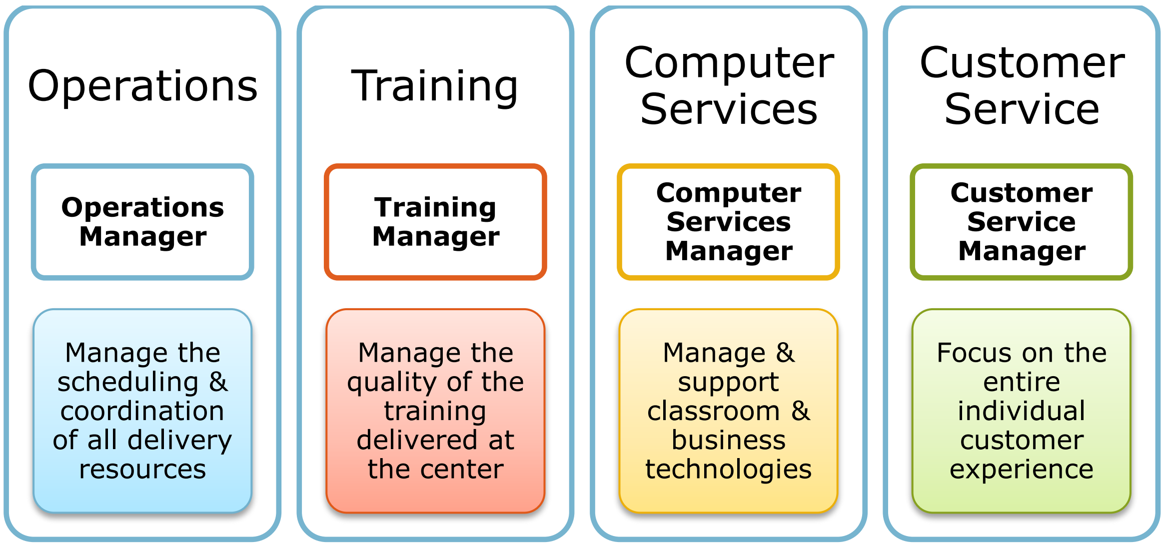
1.2.1 Sales

The Sales business unit is responsible for generating all center revenue. Within the Sales business unit, there may be the following:



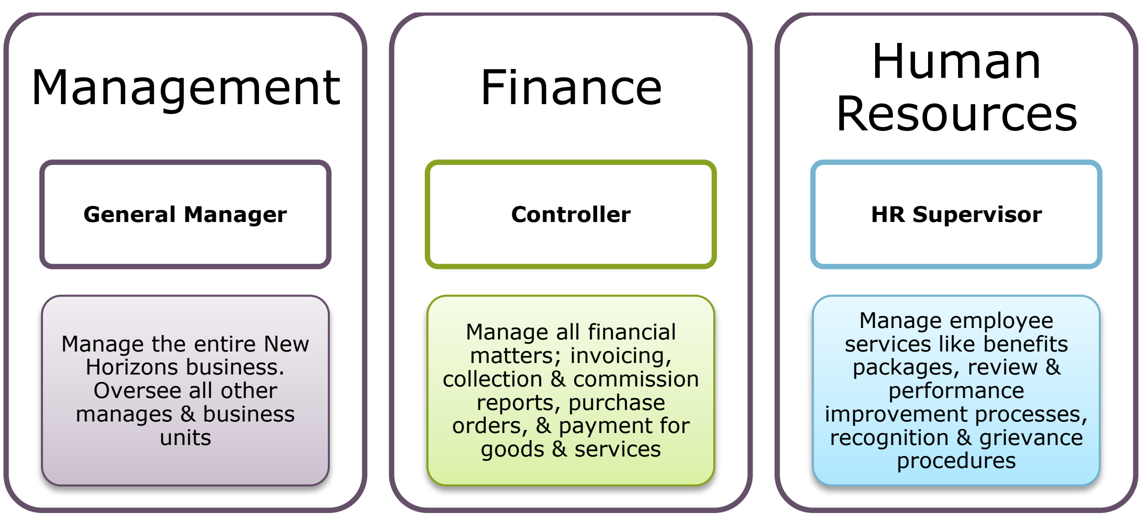
1.2.2 Delivery

The Delivery business unit is responsible for providing the training services sold by Sales and managing the resources needed to support the business. Within the Delivery business unit, there may be the following:



1.2.3 Administrative

The Administrative business unit is responsible for managing and tracking the other two departments, ensuring cash flow requirements for the business are met and complying with the various laws that apply locally and nationally. Within the Administrative business unit, there may be the following:



1.2.4 Your Department

Account Executives are a part of the Sales Department. Your Sales Manager may be responsible for the management and development of all levels of Account Executives and Sales Department Assistants.

Section 1.3 Values

New Horizons holds our Corporate Values in high regard and believes that they create a culture of success for our centers, our employees, and our customers. Live by and incorporate them in your daily life, throughout your career.

Our Value Statements are:

- **ACT WITH INTEGRITY, ETHICS AND HONESTY**
- **CELEBRATE SUCCESS AND RECOGNIZE OUTSTANDING ACHIEVEMENT**
- **TREAT EVERYONE WITH RESPECT**
- **SUCCEED THROUGH TEAMWORK**
- **TAKE INITIATIVE AND EXPECT ACCOUNTABILITY**
- **EXCEED CUSTOMER EXPECTATIONS**
- **PERFORM WITH PASSION AND COMMITMENT TO SURPASS OUR GOALS**

During your orientation phase, observe how the Value Statements affect the management of the daily operations at your center. Solidify our values in your mind and actively live them in your career.

Section 1.4 Our Credo

This philosophy drives our business culture.

WE ARE A SALES COMPANY THAT SELLS TRAINING.

WE BELIEVE IN A DEMONSTRATION CLOSE, UNDERSTANDING THAT KNOWLEDGE IS AN INTANGIBLE PRODUCT AND THUS "IF YOU CAN'T GIVE IT AWAY, YOU CAN'T SELL IT."

WE BELIEVE IN AN AGGRESSIVE SALES CULTURE, DRIVING MARKET DOMINATION THROUGH DAILY INSISTENT PROSPECTING AND PROFILING.

WE BELIEVE EACH MARKET MUST BE APPROACHED INDIVIDUALLY, AND EACH ACCOUNT WON AND MAINTAINED INDEPENDENTLY.

WE BELIEVE IN DELIVERING HIGH QUALITY TRAINING, DELIVERING MEASURABLE RESULTS TO BOTH THE INDIVIDUAL AND ENTERPRISE.

WE BELIEVE IN EDUCATING OUR WORKFORCE, PROVIDING THEM THE SKILLS TO EXECUTE THEIR ROLE. WE UNDERSTAND THAT OUR PEOPLE DRIVE OUR RESULTS.

WE ARE A SALES COMPANY THAT SELLS TRAINING.

This belief is the cornerstone of our business outlook. Rather than define ourselves as a *Training* company, we like to think of ourselves as a *Sales* company. This is not to disassociate ourselves from training, but rather to focus our efforts on the side of our business that we believe makes or breaks us, the sales department. We understand buyer's motivations, buyer behaviors, and believe we can manage and influence each sale. You will build a successful career at New Horizons if you both understand and build toward an expertise in Selling.

WE BELIEVE IN A DEMONSTRATION CLOSE, UNDERSTANDING THAT KNOWLEDGE IS AN INTANGIBLE PRODUCT AND THUS "IF YOU CAN'T GIVE IT AWAY, YOU CAN'T SELL IT."

New Horizons is not an academic institution that promotes knowledge for the sake of knowledge. Through New Horizons training, our students obtain knowledge. With that knowledge, they are able to improve their performance to solve a business problem or fulfill a career aspiration. Experiencing the direct results of our offering helps to establish a tangible value to our service. Being able to offer a sample of the New Horizons experience to our clients allows us to demonstrate the value of the results and qualifies that our services are worth the investment of their time and attention.

WE BELIEVE IN AN AGGRESSIVE SALES CULTURE, DRIVING MARKET DOMINATION THROUGH DAILY INSISTENT PROSPECTING AND PROFILING.

Effective and efficient Prospecting, every day, is what will build your client base and enable you to succeed. Through outbound cold calling to develop new business contacts and continued conversations with clients who have worked with New Horizons in the past, you will be able to develop a sustainable pipeline of opportunities and a more predictable forecast. When compared to the other selling activities in our Sales System, successful Account Executives spend more time Prospecting than on anything else. Your measurements reflect this belief, with minimum expectations for calls, new contacts, and added opportunities.

WE BELIEVE EACH MARKET MUST BE APPROACHED INDIVIDUALLY, AND EACH ACCOUNT WON AND MAINTAINED INDEPENDENTLY.

Markets, like the individuals that make them up, have distinct characteristics. Each market needs an approach designed to leverage that markets unique characteristics. For example, this can mean heavy involvement in the local chamber of commerce in one market or little in another. It might mean a heavy spend on radio to drive customer interest, or none. The individual characteristics of markets are distinct to local cultures.

Markets are made up of a collection of organizations and individuals. Those organizations and individuals are unique to their circumstances; it will be up to you to manage the complexities of the relationship with each. Accounts once won, must also be maintained. Maintenance of Accounts will require you to constantly improve your skill set and continuously penetrate an account. Make it a habit to keep a pulse on the movement, motion, activities of your client.

WE BELIEVE IN DELIVERING HIGH QUALITY TRAINING, DELIVERING MEASURABLE RESULTS TO BOTH THE INDIVIDUAL AND ENTERPRISE.

Our training is second to none. You can take pride that your product line is the best in the business. Annually, we deliver more training to more individuals than any other IT training company in the world. We consistently outperform other IT training centers when measured by 3rd party research companies. You will be the catalyst in "*empowering people around the world to succeed through learning*". You will solve problems, both for individuals and companies. Through your efforts, you will assist them in achieving their success.

WE BELIEVE IN EDUCATING OUR WORKFORCE, PROVIDING THEM THE SKILLS TO EXECUTE THEIR ROLE. WE UNDERSTAND THAT OUR PEOPLE DRIVE OUR RESULTS.

We would not sell anything we did not believe in, and we sell training. We strive to make available the resources you will need to develop your skills and better understand the trends in the industry. Though the tools are available, it is up to you to use them. You are in the driver's seat of your skills acquisition.

Section 1.5 Overview of the IT Training Industry

Section Key Terms

Traditional Instructor Lead Training (TILT)	*Training that occurs when the instructor and students are located within the same physical location and are advancing through the course content at the same pace.*
Synchronous	*Schedule dependant training where all participants advance through course content at the same pace.*
Asynchronous	*Non-schedule dependant training where a learner can take as much or as little time with the course content as they wish.*
eLearning	*Term covering a wide set of applications and processes, such as web-based learning, computer-based learning, virtual classrooms, and digital collaboration. It includes the delivery of content via Internet, intranet/extranet, audio- and videotape, satellite broadcast, interactive TV, CD-ROM, and more.*
Online ANYTIME (OLA)	*Web-based, asynchronous New Horizons training typically purchased as an annual or multi-annual subscription basis per learner.*
Online LIVE (OLL)	*Web-based, synchronous New Horizons training with a dedicated instructor who progresses learners through the course content.*
Mentored Learning (ML)	*A classroom learning experience that blends instructor led training with technology training tools, allowing for a customized education experience. Learners can attend components of the course content at their convenience, while having access to a Mentor (certified Instructor) to support with difficult concepts and prescriptive learning.*

Information Technology (IT) is a critical element within most organizations. Virtually, every company, large or small, needs these technologies to remain competitive.

Growth and changes in technology drive a need for people with skills to maximize the effectiveness of that technology. Because of this, companies need computer training on a wide range of topics from how to use a computer to how to interconnect networks. They want a quality learning experience, convenience and flexibility. The result is growth for those companies that can bring quality training services that address these customer needs.

1.5.1 IT Training Industry Trends

New Horizons began offering training through the traditional use of classrooms led by an instructor, which we now refer to as Traditional Instructor Lead Training (TILT). The trend in training has grown from TILT to technology-based training and other hybrid offerings, combining the benefits of both.

Learners and businesses seek training solutions that:

- Solve problems, issues or concerns.
- Address how and when learners learn.

The training solutions offered today must address the demands of both adult learners and the businesses that require performance improvement from their employees. There is also an increased need for training that exploits the capabilities of technology. These evolving requirements have driven the creation of many technology-based training and hybrid offerings.

Demands that are influencing this trend include:

- The general level of computer savvy indicates that learners are comfortable with finding and acquiring information via their computer through help menus, search engines, and other knowledge repositories.
- Learners and employers require that formalized training fit into their schedule and circumstances.
- Collaborative technologies that support the sharing of knowledge among colleagues make it easier to gain access to experts in the workplace.
- Learner-Centered Training requiring non-linear, self-directed education, as the expectation has shifted from course completion to competency.
- Technology now supports more courses, degrees, and universities that are available through technology-based or distance-learning offerings.

1.5.2 The Competitive Landscape

In the past, it was fairly simple to identify our competitors: other companies that were providing computer training in classrooms. Today, our competition is not so well defined. It is important to understand how the New Horizons' solution differs from that of our competitors and competitive offerings. Here are some general competitor classifications and their general weaknesses:

- Programs are lengthy
- Limited availability of offerings & modalities
- Focus on degree rather than productivity

Colleges

- No other classroom learning competitor can match our number of locations & range of offerings

Classroom Learning

- Focus on only one style of adult learning
- Have shown poor retention rates over time

eLearning

- Provide ad-hoc training versus standardized, vendor approved training
- Cannot provide a comprehensive solution

Niche

- Do not provide the hands-on experience to master complex skills
- Often do not address the skill needed

Books & Help Menus

- Use of in-office experts to transfer knowledge often times decreased their overall productivity

Local Experts

Classroom Training Providers

New Horizons has many competitors that offer traditional classroom computer training. Many of these companies also offer forms of technology-based training or eLearning. These competitors range from global corporations to small, locally owned businesses.

Typically, the largest competition today will consist of either or both a local or regional training provider or a college/university. The following list includes global training providers that offer classroom training:

- Aptech
- ExecuTrain
- Global Knowledge Network
- Learning Tree International
- NIIT

Competition as a rule is a good thing. It keep us sharp, providing our customers with options and provides us with an impetus to always improve our products and services.

eLearning Providers

eLearning represents a growing segment of the computer training industry. Companies that once produced computer-training programs on CD-ROM are now offering Web-based training and value-added services such as online tutoring. Just as the number of eLearning providers have increased, so have the number of different services that these companies provide. This trend toward sophisticated online training is likely to continue as companies attempt to make computer training more convenient for customers around the world. We expect the worldwide corporate eLearning market to grow tremendously over the next few years.

Our competitors in eLearning include the following companies:

- Element K
- Convergys.com
- Learn2.com
- SkillSoft

New Horizons has collaborated with some of these providers in order to offer the best eLearning solutions possible to our customers. Due to economies of scale, and a lack of a local sales force, many eLearning providers focus their selling efforts on very large enterprise organizations, leaving the small to medium business market relatively untapped.

Niche Providers

Niche providers focus on a technology, a business segment, or a particular subject such as project management or ITIL[5]. Examples of these niches are:

Technology	Business Segment	Particular Subject Area
Cisco Application Development Business Intelligence	Career Development	Business Skills Project Management

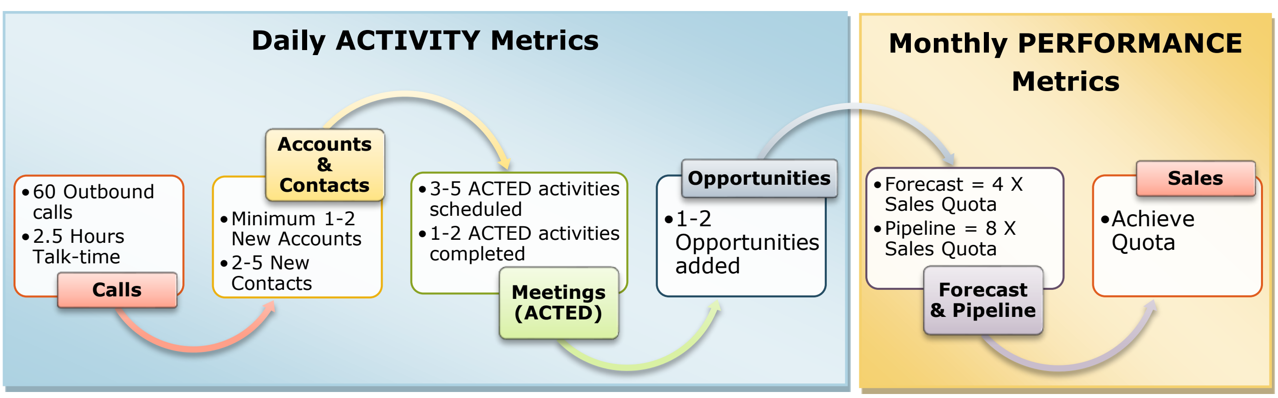
[5] *The **Information Technology Infrastructure Library** (**ITIL**) is a set of concepts and practices for managing Information Technology (IT) services, development and operations.*

Chapter 2 Measurement of Accountability

Section 2.1 Metrics

Section Key Terms

Account	*A company within the New Horizons Territory that has been captured or referenced within your CRM.*
ACTED	*Customer agreement to advance from Prospecting stage by committing to one of the following:* – ***A**udit of a course* – ***C**ourse evaluation or purchase* – ***T**our of your center or other scheduled meeting* – ***E**vent attendance in a promotional event offering* – ***D**emo of eLearning solution such as Online LIVE, Online ANYTIME, MeasureUp Testing, or Learning Port*
Quota	*The minimum sales amount you are expected to achieve each month. See Minimum Sales and Collection Standards.*
Opportunity	*A potential sale where the following have been identified and confirmed by the client:* – *A need New Horizons can solve* – *A budget for resolving the need* – *The authority to make a purchasing decision is established*
Pipeline	*The total value and number of all existing open Opportunities actively being developed by an individual or a center within a given timeframe, typically in 30, 60, and 90 day increments.*
Customer Relationship Manager (CRM)	*A database system used to manage and document client interactions and selling activities.*



Metrics are the Activity and Performance measurement standards applied to daily, weekly, and monthly targets. Activity Metrics measure effort where as Performance Metrics measure the results of the effort.

Metrics help to structure an Account Executive's daily and weekly sales activities. They can provide insight and support from the Sales Manager into potential roadblocks to success.

2.1.1 Activity Metrics

Account Executive metrics focus on activities that drive account acquisition, with an emphasis on prospecting activities. Level II and Senior Account Executive metrics focus on account penetration, with an emphasis on solutions-based profiling activities.

Internalize these activity metrics a large part of your initial success is driven by these activities:

Daily Activity Metrics	
Phone Time	Two and a half (2.5) hours per day
Outbound Calls	Minimum of 60 calls per day with a target of 80
New Accounts	Three to five ACTED[6] Accounts added to CRM per day

Weekly Activity Metrics		
ACTED Scheduled	A future activity scheduled in CRM including Audits, Courses, Tours, Events, and Demos	15 -25 per week
ACTED Completed	ACTED activity or Meeting attended & recorded in CRM	5 - 10 per week

2.1.2 Performance Metrics

Monthly Performance Metrics	
Quota	Meet or exceed Sales Quota
Pipeline	Growth and stability of pipeline is excess of 8 X monthly Sales Quota
Collections	Aging / collections report kept to below 45 days DSO
CRM	Account records are current and contacts follow that account management practices noted in the Administrative Tasks section of this manual

[6] *Action by the potential client that include an acceptance to any of: Audit, Course, Tour, Event or Demo. The acceptance moves the potential client from a Prospect to an Account classification.*

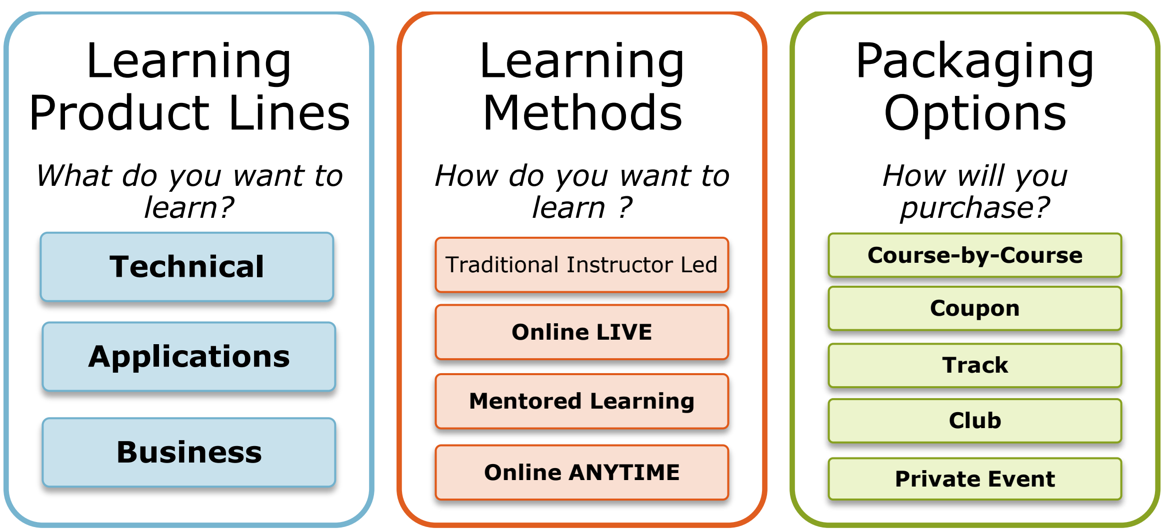
Chapter 3 Learning Solution Basics

Information systems play a key role in nearly every business, and demand for skilled employees is growing daily. Organizations need to be assured the professionals they hire can handle real world; technology-based responsibilities, and employees and job seekers need credentials that demonstrate these qualities.

New Horizons offers more Information Technology training courses, at more locations, and at more times than any other computer learning company in the world. This wide range of services is key to our success. Our learning solutions help customers solve problems, improve performance, and successfully complete projects, such as upgrades or migrations.

Quality learning is the key to training and certification. New Horizons provides the quality and flexibility that only the world's largest training company can offer. Regardless of the subject, students receive comprehensive training from highly qualified instructors, authorized training and curriculum materials, and the flexibility to schedule courses anywhere and anytime, day or night.

Though New Horizons offers a very robust schedule of offerings, each solution can be broken down into three distinct components:



Learning Product Lines

New Horizons' training provides a blueprint for professionals to plan, implement, manage, and use information systems. Business skills training and certification can assist students in the following areas:

- Enhance on-the-job performance and productivity
- Improve efficiency by learning optimum methods of solving technological issues
- Obtain advanced technical skills through hands-on, real world experience
- Keep up with changing technology
- Get an advantage in career development

New Horizons' learning product lines reflect our dedication to providing comprehensive skills development for the use of technology in business and are broken into three categories*:*

- Technologies that enable a business network at the Network & Server device level, including directory services, messaging, collaboration, security, data storage, application development, & database architecture.

Technical

- Desktop programs employed by end-users for business & personal use, including operating systems, word processing, spreadsheets, presentations, and web & graphic design.

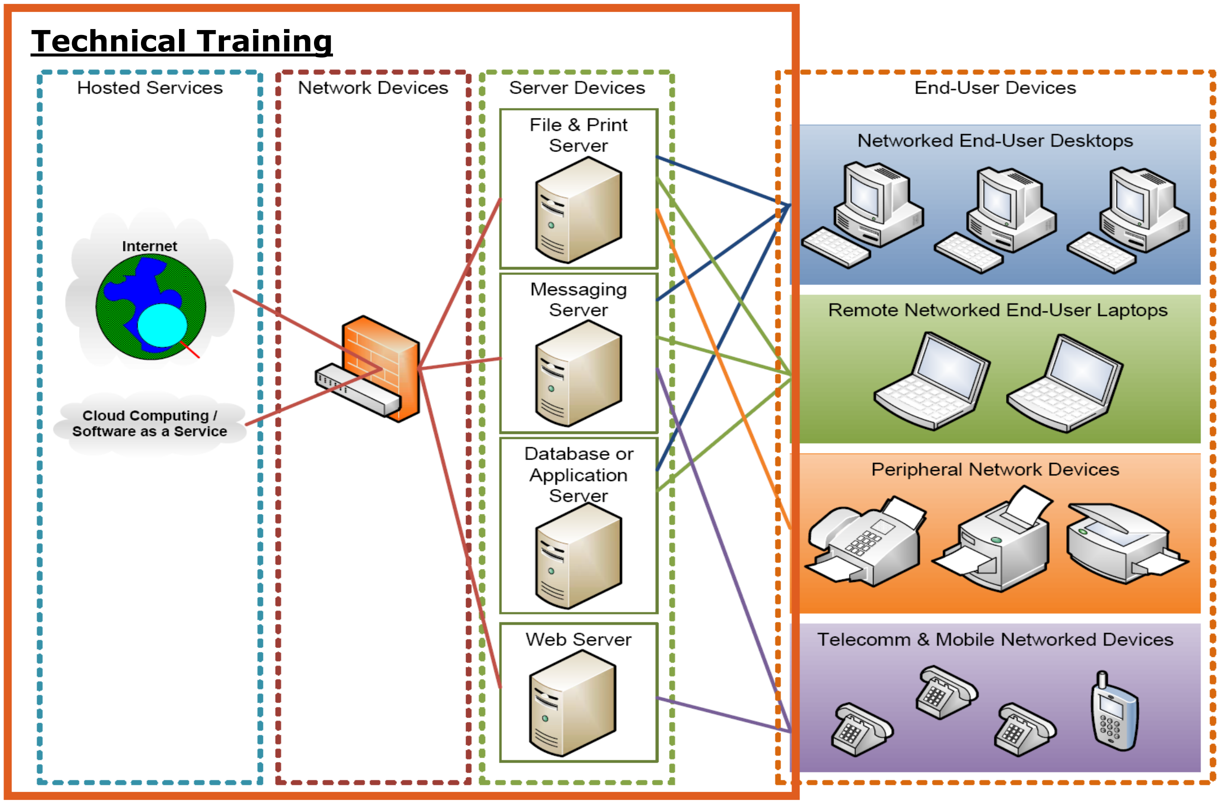
Applications

- Business, or soft skills, that support the use of technology , including healthcare information, project management, ITIL, management skills, & soft skills.

Business

3.1.1 Technical Training

This basic sample of a network diagram on the next page shows how network technologies interact with each other. Technical training is available for the hardware and software used in the Server Devices, Network Devices, and Hosted Services categories.

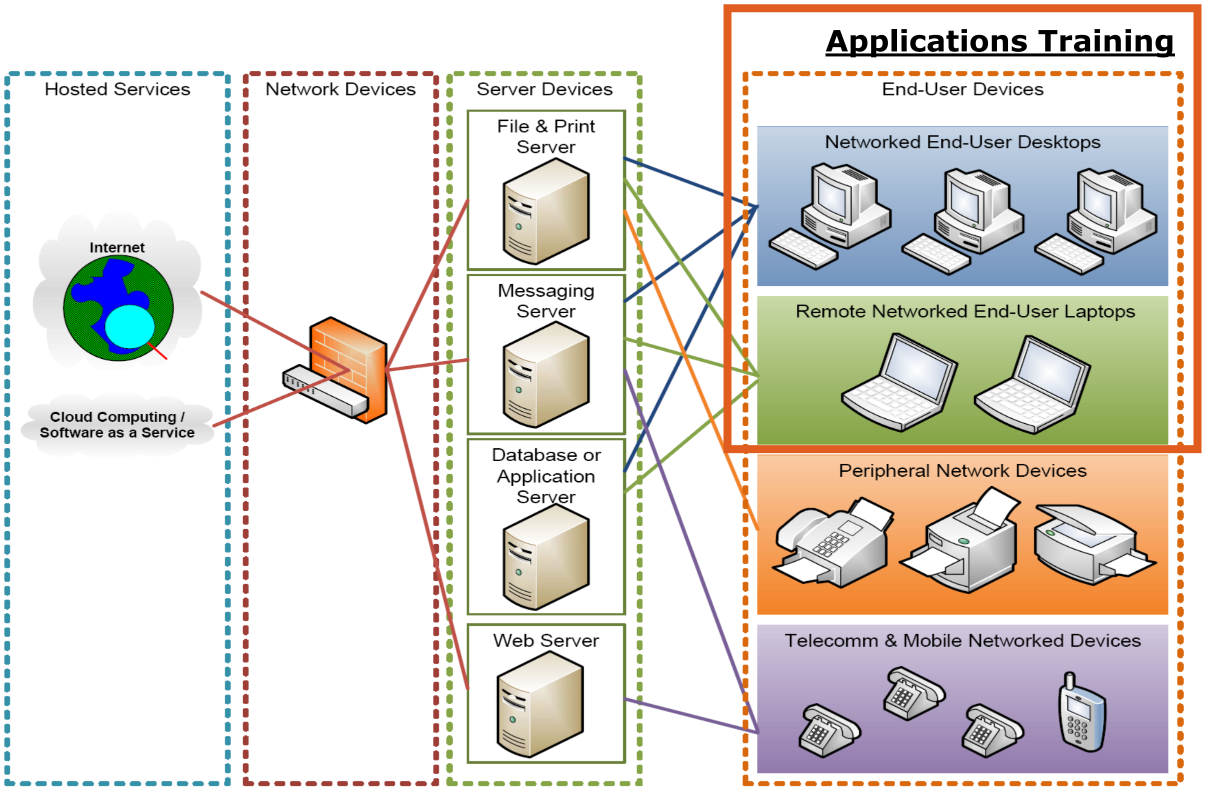


Technical Training is either vendor neutral or vendor authorized. Vendor neutral offerings, like CompTIA training, focus content around the performance outcome, such as; A+ Hardware or Security+ certifications and utilize the industry standards and best practices in hardware and software. Vendor authorized training are those courses that are developed by the hardware or software provider. Microsoft, Cisco, and Citrix are just a few of the software/hardware providers that develop training content and the standards by which the courses must be delivered. For example, Microsoft authorized courses must be delivered in a classroom that meets minimum hardware specifications, by a Microsoft Certified Trainer (MCT), using the Microsoft Official Curriculum (MOC) kits.

Exams, which are also administered within New Horizons, test that students are able to apply concepts that were taught in training. Certifications validate that the learner has demonstrated they have acquired the skills related to the certificate area. The vendor or content provider determines both exams and certifications.

3.1.2 Desktop Application Training

Applications training courses revolve around the use of specific software applications, like Microsoft Excel or Adobe Photoshop. Applications training courses, though focused on a vendor application, are not dictated by the software vendor. Virtually anyone who uses a computer for business or personal use is a candidate for applications training.



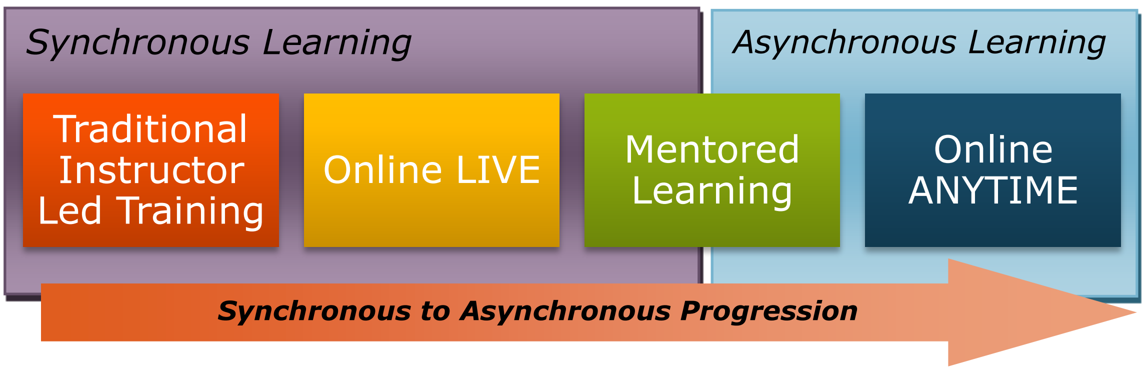
3.1.3 Business Skills Training

Business skills tie technology to a specific business purpose, beyond its features and functionalities; such as Creating Effective Presentations, which extends beyond how to perform functions in Microsoft PowerPoint to how to analyze an audience, using visual aids, and the fundamentals of persuasion. As students progress through their careers, New Horizons also provides training to support non-technology related soft-skills, such as management skills, time management, or conflict resolution.

	**Healthcare Information Management (HCIM)**
	**Project Management**
	**Effective Communication & Presentation Skills**
	**Managerial Leadership**

Section 3.2 Learning Methods

Learning methods are inclusive of the methodology and the modality. A learning methodology is an industry recognized method of categorizing how the content is delivered to the learner. Learning methodologies include synchronous and asynchronous learning. The learning modality is how New Horizons has defined our product offering, so are New Horizons' specific terms that fall within the learning methodology. New Horizons' learning modalities include Traditional Instructor Led Training, Online LIVE, Mentored Learning, and Online ANYTIME.



3.2.1 Learning Methodologies

Section Key Terms

Asynchronous	*Does not occur at the same time. Opposite of 'Synchronous'*
Asynchronous Learning	*Learning which occurs without time constraints. Examples are self-paced courses taken via the Internet or CD-ROM, Q&A mentoring, online discussion groups, and e-mail.*
Synchronous	*Something that happens at the same time. Opposite of 'Asynchronous'.*
Synchronous Learning	*A real-time, instructor led online learning event in which all participants attend at the same time and communicate directly with each other. See ILT.*

Synchronous learning is any learning event where interaction happens simultaneously in real-time. This requires that learners attend class at its scheduled time. Training could be held in a traditional classroom, or delivered via distributed or e-Learning technologies. In a synchronous learning environment, students have the ability to learn not only from their instructor, but also from their peer-group within the class.

Conversely, asynchronous learning is student-centered learning that occurs without time constraints. Some asynchronous learning options include message boards that are monitored by experts or peers. These two learning methodologies can be blended, combining some synchronous and some asynchronous elements.

3.2.2 Learning Modalities

Section Key Terms

eLearning	*Term covering a wide set of applications and processes, such as web-based learning, computer-based learning, virtual classrooms, and digital collaboration. It includes the delivery of content via Internet, intranet/extranet, audio- and videotape, satellite broadcast, interactive TV, CD-ROM, and more.*
ILT	*Instructor Led Training. Delivery options include Traditional Instructor Led Training, Mentored Learning, and Online LIVE.*
Mentored Learning	*Mentored Learning (ML) is a classroom learning experience that blends instructor led training with technology training tools, allowing for a customized education experience.*
Online ANYTIME	*Asynchronous, self-paced, eLearning that is accessed online or via CD-ROM.*
Online LIVE	*Synchronous, online classroom environment where the instructor facilitates learning to students attending the course remotely. Course lecture as well as lab exercises are accessed via the internet.*
TILT	*Traditional Instructor Led Training. A training event where all participants and instructor are located within the same physical location.*

Since first opening its doors as a classroom learning provider, New Horizons has continuously evolved our learning modality offerings to address the latest in technological advancements and the change in user savvy and business requirements. New Horizons offers training in a traditional classroom environment, online classrooms, self-paced eLearning, and our unique blend of self-paced instruction with the support of expert certified trainers.

Traditional Instructor Led Training

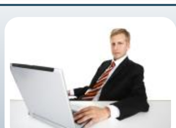
- Students attend a scheduled training event at a designated physical classroom location that is led by an instructor that meets the New Horizons training standards & is vendor certified, if applicable.

Online LIVE

- Students attend a scheduled training event that takes place in an online classroom or online access to a physical classroom. The instructor must meet the same qualifications as in TILT & is also trained to deliver classes online.

Mentored Learning

- Students schedule training sessoins at a New Horizons center where they view online lectures & complete lab activities with the support of a vendor certified Mentor who is available to answer questions & provide guidance.



Online ANYTIME

- Students can access course content online, from anywhere, for the duration of their subscription. Some sbscriptions include access to labs utilizing virtual access to live equiptment. There are no instructors for Online ANYTIME.

Section 3.3 Packaging Options

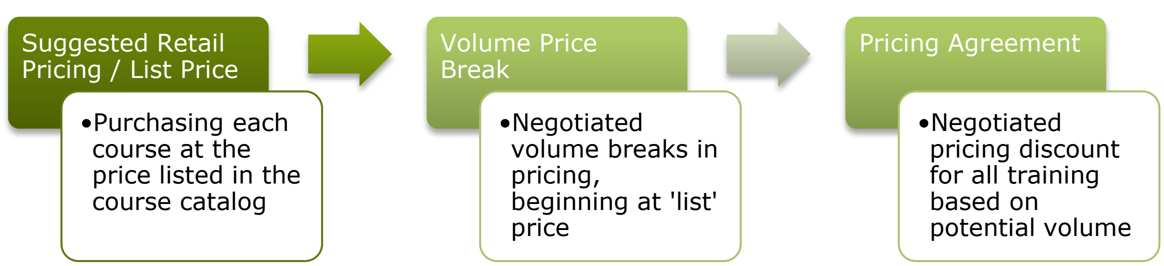
Because each customer has different purchasing needs and their own internal processes, New Horizons has established packaging and pricing options to address those needs. Not all options are available for all modalities. This table categorizes the high-level package availability by modality.

	TILT	Online LIVE	Mentored Learning	Online ANYTIME
Course-by-Course	X	X	X	
Coupon	X		X	
Track	X	X	X	
Club / Library	X		X	X
Private Event	X	X		

3.3.1 Course-by-Course

Course-by-course pricing, as the name implies, is the purchase of courses one-at-a-time. For our business customers, this type of purchase is more applicable to organizations that have purchasing guidelines that require a strict accounting of who is receiving training based on budget allocation or that have

Though there are a few options for course-by-course purchasing, it provides the lowest discount percent. Because it is in your best interest to have customers make their volume purchase up-front, providing steep discounts to course-by-course pricing will not provide the motivation needed to purchase the volume-guaranteed purchase options.



Suggested Retail Price / List Price

Because purchasing training course-by-course does not imply any degree of volume, most course-by-course purchases are sold for the pricing that is listed in the course catalog. Unless there is an expectations of volume over the course of a year or you are in a competitive situation and are trying to get a client to leave a competitor, there is no expectation that you will have to discount the price of a single class.

Volume Price Break

If there is the potential for volume over time, you can establish volume price breaks with a customer. This purchasing option creates volume thresholds that, when met, will allow for a discount on future purchases. The table below illustrates a sample of a volume price break pricing agreement.

Days of Training Purchased	Discount % to List Pricing
1 – 10	0%
11 – 20	5%
20 – 35	7%
35 – 50	10%
50+	12%

Pricing Agreement

Pricing agreements are reserved for large enterprise customers. Customers receiving pricing agreements must meet the following minimum criteria; your Sales Managers given their analysis of your market will determine exact volumes:

Volume	☑ Have a history of purchasing a high volume of training (from your center of a competitor) OR ☑ Have the potential to purchase a high volume of training due to a change in their business (expansion, large IT initiative, etc.)
Budget	☑ Have established a budget for training AND ☑ You have access to their allocation process

3.3.2 Coupons

Coupons allow customers to make volume purchases and receive the greatest pricing discount. Each coupon is equivalent to one day of training. Coupons can be purchased for technical training, applications training, or business skills and can typically be used for TILT and Mentored Learning. Some centers restrict coupons to a specific modality, for example a company could purchase 10 TILT applications training coupons that can only be used for classroom training. Another center may elect to expand the usage of their coupon, allowing a company to buy 10 applications coupons that can also be used for non-certified business skills courses and can apply to TILT, Mentored Learning, or Online LIVE.

When selling coupons, you must determine not only the product line and modality, but also their reach. Because National Coupons imply the incurred cost of delivery at another New Horizons location, their cost must exceed Interfranchise Pricing.

Local Coupons

- Can be used within your center's territory only

National Coupons

- Can be used at any New Horizons location within your country or defined regional territory

3.3.3 Tracks

A track is a series or course, offered in sequence, that lead to a specified knowledge and skill outcome.

Certification Tracks

The vendor that provides the certification determines certification tracks. Certification tracks are available for technical training, like a Microsoft Certified IT Professional (MCITP) or Cisco Certified Network Professional (CCNP); applications training, like Microsoft Certified Application Specialist (MCAS); and business skills, like Project Management Professional (PMP).

The certification track includes the courses that are needed to gain the knowledge needed to pass the related exams. In order to obtain a certification, students must successfully complete the exams required by the certifying vendor. Often times, New Horizons' centers will package the exams into the certification track.

Career Advancement Tracks

Career advancement tracks are combinations or 'bundles' of courses that are grouped by your New Horizons center and are not limited to a single modality of delivery. Career advancement tracks are not exam or certification driven; they are driven by an area of performance improvement.

Career advancement tracks can be custom created based on a customer's business requirements and the student's skill level. Businesses that have determined the skills needed for a specific job role that they have many of may create a career advancement track specific to that job role. For example:

> *ServSource has a team of 15 field engineers who provide IT services to their branch locations. The manager has determined that each engineer should have a basic understanding of Microsoft and Cisco technologies and customer service skills. Because their schedules are varied, the technical training courses will be Mentored Learning and the customer service courses will be TILT. To aid with on-the-job learning, an Online ANYTIME library is also included.*

Career advancement tracks can also be created to align with an employee's professional development plan. For example:

> *An employee has been promoted within the accounting department and does not have experience with the current version of spreadsheet software being used.*
> *The Career Advancement Track created for this customer and student might include the current version of the Excel series (Levels 1 – 3), plus Financial Essentials, and Budgeting.*

3.3.4 Clubs

Club Memberships allow individuals to take any number of classes offered in a particular club group within a specified period. Memberships are purchased for a six-month or one-year period and begin on the date of purchase. There is no better value for purchasing computer training than a Club Membership. It gives a student access to multiple training opportunities that would cost a great deal more if purchased one course at a time.

Club Membership

Club Memberships are purchased by a company and assigned to an individual student. Some centers offer the ability to transfer the club membership if the student the club was purchased for is no longer employed. Transferred clubs incur a fee and are only valid for the period remaining on the original club.

Corporate Club

Some centers, but not all, offer club memberships that a company can purchase. These Corporate Clubs, or Seat Licenses, are substantially more expensive than a single student club membership and essentially allow any employee from the company to attend a training class, within the limits of the club, one-at-a-time and on a space available basis.

Library Subscriptions

Library subscriptions apply only to Online ANYTIME. Library subscriptions can be purchased for a duration of one to three years and provide a single user unlimited access to the courses included in the library. If, during the term of the subscription, new courses are added to the library, current students will have access to the added content.

3.3.5 Private Events

Private events are those that are only available to employees of a given company. If a company would like to train several employees, at the same time, and not allow students from other companies to attend, a private event is the best option. Customers that would like to customize the content of a TILT course can do so with a private event.

This table breaks down the basic components of each type of private event.

	Location	Instructor
Dedicated Class	New Horizons or Online LIVE	New Horizons
Client-Site / On-Site	Client location or Off-site	New Horizons
Room Rental	New Horizons or Online LIVE	Client

Dedicated Class

A dedicated class is a private event that takes place at a New Horizons center or via Online LIVE classroom and is taught by a New Horizons instructor.

Client-Site / On-Site Event

A client-site or on-site event takes place a customer’s location or other off-site location, like a hotel meeting room, which is taught by a New Horizons instructor.

Room Rental

A room rental is a private event that takes place at a New Horizons center or via Online LIVE classroom and is taught by a customer provided instructor. A room rental could be utilized by an organization that uses a proprietary line-of-business application that all employees must use, but the company does not have the dedicated classroom space and computers needed to conduct training at their location.

3.3.6 Value Added Services

Included with many of our training solutions, are other value added services that set us apart from the competition.

Authorized Testing Centers

Most New Horizons centers have a testing booth where candidates for technical computer certification can take online exams. Being able to get training and take certification exams in one place, like an authorized testing center, simplifies the certification process for IT professionals.

Computer Labs

Every New Horizons center has a computer lab where students can practice what they learn in class. The computer lab consists of workstations connected by a network. Computer labs give students access to eLearning materials. The labs provide clients a place to practice, study, and test their skills before taking a certification exam. Skills assessment services may also be available on computer lab workstations so that students can measure their current skills and identify areas that need improvement.

Courseware

When a student takes a TILT or Online LIVE course at New Horizons, they receive a New Horizons Learning Guide, an abridged courseware manual. The content of the Learning Guide matches what is discussed in the course.

Learning Guarantee

We have a learning guarantee for every class. If a student attends a class and does not feel proficient on the topics presented, the student may repeat the class at our facility at no charge, on a space available basis. A class can be repeated for up to six months from the original class date. If a student is displeased with a class delivered via Online LIVE, he or she may take the same class at their local center at no charge.

Skills Assessment Testing

We offer Skills Assessment Tests to individuals or Decision Makers who want to measure the computer skills of a group of employees. By measuring their current computer skills before they get training, customers can feel confident in purchasing training that meets their needs.

Test/Pass Guarantee

To be certified, students must pay for and pass certification exams. New Horizons offers test preparation tools to assist students planning to take certification exams. Assuming certain guidelines are followed, we also offer students a Test/Pass Guarantee. If a student fails a certification exam after he or she passes a New Horizons practice exam at 90% or higher, we replace the student's testing voucher free of charge.

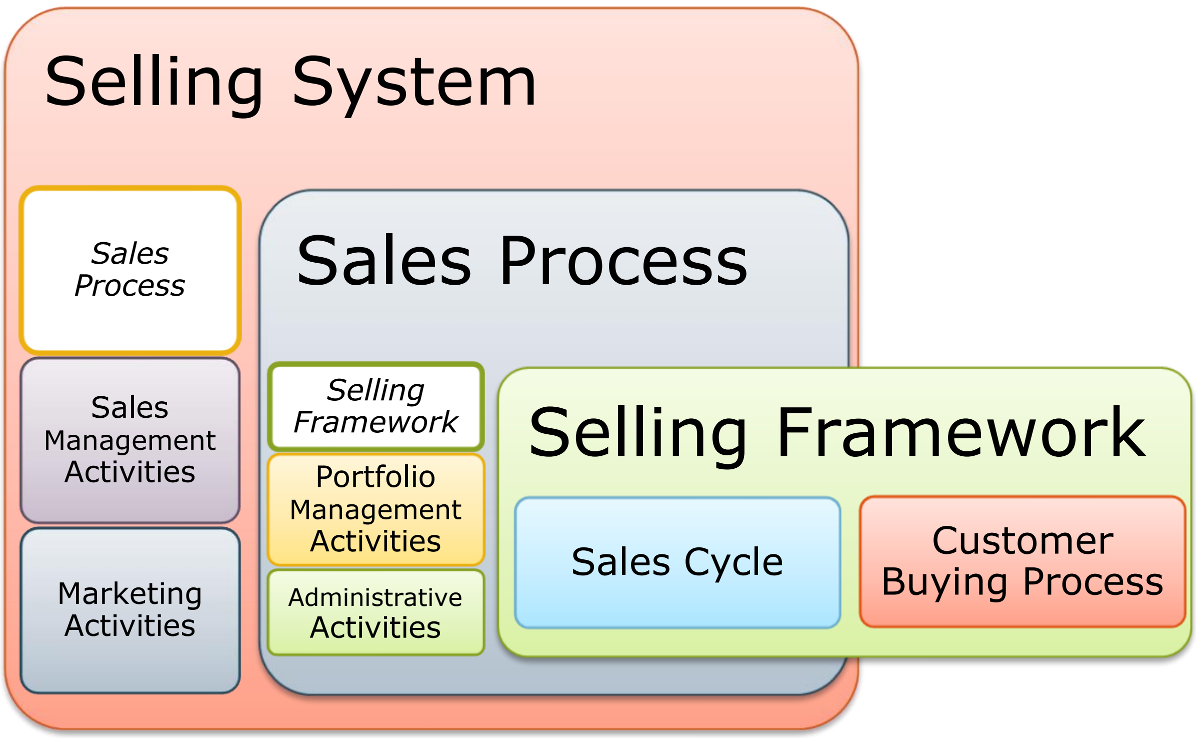
Chapter 4 Responsibilities

The Components of the New Horizons' Selling System:

Component	Definition
Sales Cycle	All customer facing selling activities in the Prospect, Profile & Qualify , Explore Needs, Build & Present Solution, Commitment & Close, and Implement stages.
Buying Process	The process that the customer goes through when deciding to make a purchase.
Portfolio Management	Managing your account portfolio including account prioritization (tiering), timely outreach to contacts, and current, complete, and accurate account notes.
Administrative Activities	Non-customer facing activities such as sales team meetings, coaching sessions, account & pipeline reviews, or product training.
Marketing Activities	All center directed customer solicitation activities such as radio or print advertizing, schedule creation & production, and chamber of commerce or association participation.
Sales Management Process	Activities performed by Sales Managers to oversee all selling activities including measuring and managing to the metrics, reviewing portfolios, training, and coaching.

Section 4.1 The Selling System

The New Horizons' Selling System is a comprehensive term that includes all business-to-business sales-related activities. It is compromised of activities of both Account Executives and Management and provides guidelines and measurable metrics for the types, quantity, and quality of activities to perform. The Sales Process incorporates the components of the Selling System related to Account Executives, which will be explained in greater detail in upcoming sections.



Section 4.2 The Sales Process

Section Key Terms

Sales Process	*All customer facing and non-customer facing New Horizons selling related activities.*
Active Account	*A company that is currently doing business with your center, either a current buyer or a probable buyer with an opportunity is progress managed properly by an Account Executive.*
Inactive Account	*A company assigned to an Account Executive that has not by ACTED nor made a purchase within the previous six months.*
Stale Account	*An Inactive Account that had been unassigned and is not longer managed by an Account Executive.*
Strategic Prospect	*A company with a strategic presence in your center's territory that has not yet made a purchase nor been ACTED.*
Prospect	*A company that has not purchased from nor ACTED by your center.*
Tiers	*A denotation of a company's purchasing power, based on their size or value of their previous purchases.*
Portfolio	*A listing of all accounts currently being managed by a particular Account Executive.*
Decision Maker	*A contact within an Account who has the authority to make a purchase.*

The Sales Process is our documented, repeatable, selling process that outlines the necessary customer facing and non-customer facing selling activities. We use the blanket term 'Sales Process' to include all of these activities. The stages of the Selling Framework capture the customer facing activities that you will perform and that align to the stage of the Buying Process that the customer is in.

4.2.1 Portfolio Management

A portfolio is a list of accounts managed by your center. You are responsible for managing your assigned portfolio of accounts and those acquired by you through prospecting activities. The number of accounts within your portfolio will vary based on your center's territory and your ability to effectively and efficiently manage your portfolio.

4.2.2 Account Types

Your portfolio of Accounts can be further sub-categorized as:

- Active Accounts
- Inactive Accounts
- Stale Accounts
- Strategic Prospects
- Prospects

By definition, an Account is '*a Company whose information has been captured or referenced in your CRM'*. An Account can be either **Active** or **Inactive**. An **Active Account** is an Account that has ACTED or made a purchase within the last six months.

An Inactive Account is an Account that exists in the database, but has not ACTED or made a purchase within the previous six months and is at risk of becoming Stale or being transferred to another Account Executive to manage. After a period of inactivity, including no new sales or opportunities, the account will be unassigned from the Account Executive and will be termed **Stale**.

4.2.3 Account Ownership

The Account history, notes, or 'records' in the CRM determine account ownership. If you list the account in your CRM, or if your Sales Manager transfers it to you and provided you work the account properly, then the account remains in your possession and you receive the benefit of current and future business. However, the account belongs to you only as long as you work it 'properly'.

Account information that must be included in order to list it in the CRM includes:

- Company name or organization name
- Company address
- Company phone number
- Tier number (1, 2, 3)
- Name of contact
- Company web address

4.2.4 Account Tiers

Accounts are divided into three Tiers. This is to help direct your activities and sales targets depending on the tier. Revenue potential and customer buying habits determine which Accounts are assigned to which Tier. Tier 1 accounts have the highest revenue potential; Tier 3 accounts the lowest. Each center may establish different criteria for determining Tiers, such as potential revenue. Your Sales Managers will determine the Tier for each Account within the center's Portfolio. The Tiers assigned to your accounts will determine the type and frequency of activities that you are to properly manage the account.

Tier	Days of Training per Year
Tier 1	100+
Tier 2	10 – 100
Tier 3	>10

4.2.5 Account Management

You must manage the accounts within your portfolio properly to ensure that they remain active so that you may retain account ownership. You must contact the accounts in your portfolio on a regular basis to prospect for new opportunities, new contacts, and changes within their organization. Activities that demonstrate that you are managing your accounts include:

- **Frequent Communication**
- **Current & Complete Account Notes**
- **Mulitple Contacts in Multiple Departments**

Communication Frequency

The Account Tier determines the minimum frequency required of a contact.

Tier	Communication Frequency
Tier 1	Once a month
Tier 2	Once a quarter
Tier 3	Once every four to six months

Communications include face-to-face meetings or phone calls. Emails or social media communications are not considered communications for these metrics. Your conversations will build on your last conversations and should involve a message of interest, such as an upcoming event or a seminar. Each conversation is an opportunity to Profile for updates in their business.

All conversations must Advance the current opportunity, obtain a referral or consist of profiling for new opportunities. Each conversation with a Contact must be noted in the CRM.

Current and Complete Account Notes

Your center CRM houses your portfolio of accounts and contains information and purchase history of Accounts. You must enter all of the information that you obtain from a contact into your CRM on the same day as the contact takes place. All Account notes must reflect:

- Name of the contact
- Job title and purchasing role
- Contents of conversation
- Current opportunity (if applicable)
- The next step agreed to with the contact

Standards for Account Notes appear in more detail in the ***Writing Records*** *section of this manual.*

Multiple Contacts in Multiple Departments

Having multiple contacts within many departments increases your chances of uncovering opportunities. Based on account Tier level and history, your Sales Manager will set expectations for the minimum number of contacts and departments that you are to uncover each year while working the Account.

Check your CRM for an organizational chart or report to help determine what departments are not listed within an account that you can begin profiling to increase account penetration.

Tier	# of Contacts	# of Departments
Tier 1	8	4 – 6
Tier 2	6	2 – 4
Tier 3	1 - 4	1 – 2

Your goal is to work with the main point of contact, preferably a Decision Maker, on a regular basis and contact others that work within the department as well. You must also contact other departments within the organization, building your relationships with multiple people at multiple levels, seeking always to uncover opportunities.

Strive to have contacts in three different levels across three different departments.

Account Conflict

An Account Conflict is when multiple Account Executives claim ownership of the same account. There is conflict when an account is 'owned' by one Account Executive and another Account Executive identifies a new contact or opportunity that the owning Account Executive has not identified. If the Account Executive who 'owns' the account is unaware of Opportunities, they may be judged to have not managed the account properly by their Sales Manager. There are a few legitimate reasons when an Account Conflict may occur such as:

Reason	Description
DM Level	Companies merge and your current contact is a higher-level decision maker. You receive a referral from a current contact to a higher-level decision maker within an account owned by another Account Executive.
Prior Relationship	A contact from one of your Active Accounts moves to another organization that is an Active Account of another Account Executive. Your contact requests that you manage the relationship with their new organization. You have a prior working relationship with a decision maker who requests that they continue to work with you.

Receiving a lead into an account does not mean that you have the right to request transfer of the account. For example, if you receive a lead from an event that you attended, such as a trade show, and you have no prior working relationship with the Account, you should forward the lead to the owning Account Executive.

Account Conflicts are rare. Do not invest time trying to uncover opportunities within another Account Executive's portfolio. This is both unethical and potentially damaging to your center's reputation.

If you feel you have a legitimate Account Conflict, you must:

1. Cease all communications with your contact.
2. Notify your Sales Manager and complete an Account Conflict form in Appendix 6.
3. Submit the form to your Sales Manager.

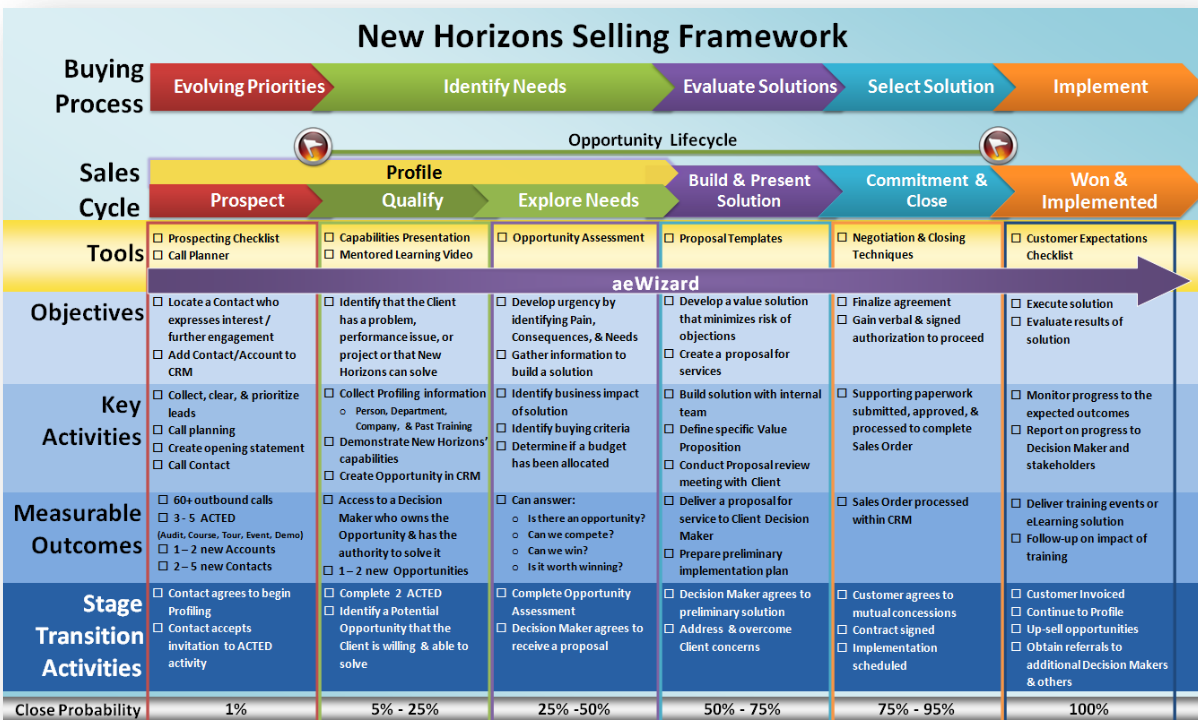
Your Sales Manager will determine who should own the account or the opportunity and will notify both Account Executives of the decision within a timely manner.

Section 4.3 Selling Framework

Section Key Terms

Sales Cycle	*The stages that an Opportunity advances through from initial engagement with New Horizons to the close and implementation of the solution.*
Buying Process	*The process that buyers go through when making purchasing decisions.*

The Selling Framework is the tool that outlines the necessary customer facing sales activities (Sales Cycle) you perform and aligns those activities with the buying process the customer goes through when making a purchase. The Selling Framework provides the structure for managing the progress of an opportunity from Prospect to Commitment & Close and outlines specific activities to perform within each stage.



If you can match your activities, conversations and advances while in your Selling Cycle to where the Buyer is in their Buying Process, you will capture the essence of the DNA of the New Horizons Sales Model.

4.3.1 Opportunity Management

An opportunity is an identified customer need that New Horizons can service; in short, an opportunity is a potential sale. The Selling Framework's function is to be an opportunity management road map to determine where you should be in the Sales Cycle relative to where the buyer is in their Buying Process. The Selling Framework is structured as a series of stages that move an opportunity from Profile & Qualify to Commitment & Close. Opportunities will progress through the Selling Framework as key milestones or Measurable Outcomes are achieved.

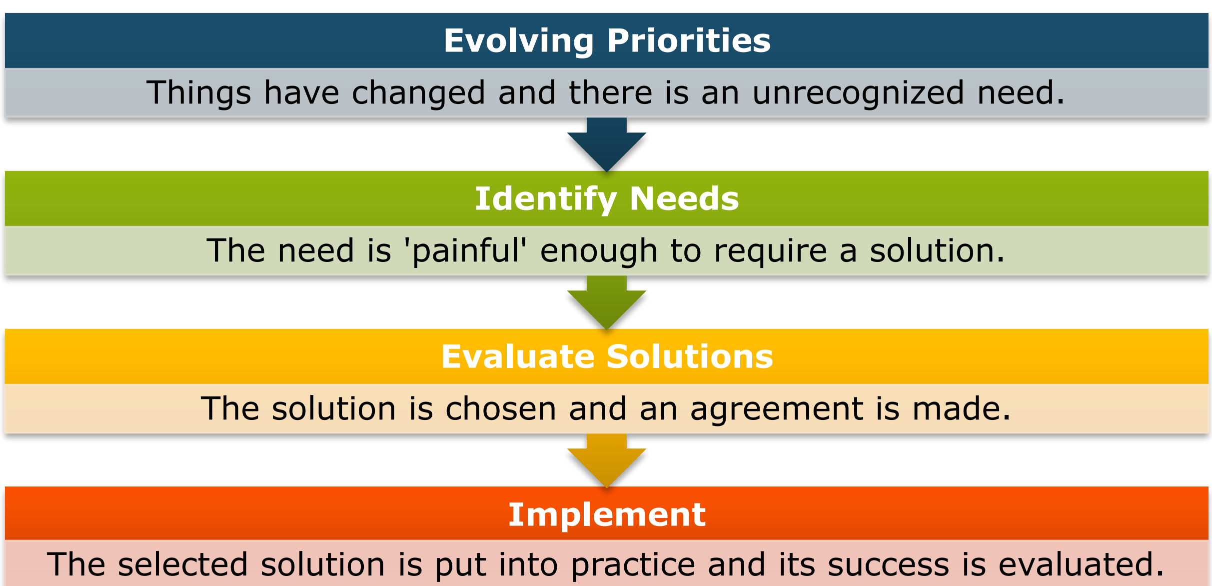
As you develop an opportunity, you will get a clearer idea of its value and close date as well as the close probability. Accounting for this information correctly will yield accurate pipeline and forecast reports.

4.3.2 Sales Process Alignment

Successful selling begins with an understanding of how your clients make the decision to buy. New Horizons organizes the Selling Framework around the customer's Buying Process and aligns it with the activities of the Sales Cycle.

The Buying Process

Learning how the buyer thinks, identifying what is important to them, and uncovering their business issues, problems or concerns, aligns you with the buyer allowing you to guide them to the best solution. It is preferable to align with the buyer at the "Evolving Priorities" stage (or ask profiling questions that map you back to the beginning of the process) to help you understand the breadth of their business issues.



1. **Evolving Priorities**
   - At this stage in the Buying Process, the potential contact is conducting their daily activities. They may have a problem but not realize the negative impact this problem is having on their business. In some cases, the contact may not even be aware of the challenge within their organization.
2. **Identify Needs**
   - The problem's severity level has moved from latent to intense and has become "Painful" enough for the buyer to solve.
3. **Evaluate Solutions**
   - Depending on the buyer's situation, they will now evaluate the various options they have available to fix the problem.
4. **Select Solution**
   - The contact makes the decision to go forward with the purchase.
5. **Implement**
   - The contact signs the paperwork and may request post-training metrics.

The Sales Cycle

Once you understand your customer's Buying Process and can identify where within the process their organization is, you can apply the appropriate strategy to move the sale forward at the right pace for the client.

1. **Prospect**
    - Prospecting is stimulating demand or creating interest in New Horizons' products and services. Prospecting is the way you take leads, determine if there may be a need for our services and turn them into 'prospects'. It is performing those activities that create an opportunity for us to provide training. Prospecting activities include collecting information, planning on how to act on the information, and making contact.
2. **Qualify**
    - Use profiling questions to uncover potential opportunities, gather information on the prospect, department, company and past training, and identify a Decision Maker.
3. **Explore Needs**
    - Ask questions regarding customer's issues and pains and the consequences of those issues then convert those issues to potential training needs that the customer is compelled to resolve.
4. **Build & Present Solution**
    - Develop a value solution then create and present a proposal to the Decision Maker that addresses the client's business issues, problems or concerns.
5. **Commitment & Close**
    - Gain verbal agreement, overcome objections (if applicable) and obtain signed authorization to proceed with the solution.
6. **Implement**
    - Deliver the training solution, up sell, and obtain referrals.

An Objection by a customer might be a sign that you have moved ahead of where the contact is in the Buying Process. Make sure you do not offer a solution before the buyer is ready. The buyer must see the problem as intense enough to justify the effort and cost to do something about it.

Section 4.4 Profiling

Profiling is a technique of asking conversational questions with a contact (an existing or potential customer) to uncover potential opportunities that might require training. Profiling takes place across multiple stages in the Sales Cycle; Prospect, Qualify, and Explore Needs.

People like to talk about two things: Themselves and their problems. You can question in a conversational manner and elicit information about your contact and their work problem. Your goal through Profiling is to uncover a:

1) Problem
2) Performance Improvement
3) Project

Collectively known as the "3Ps".

A Problem issue or challenge

- **Security breaches**
- **Server downtime**
- **Data loss**

The potential for improved Performance

- **Lack of collaboration**
- **Inefficient use of technology**
- **Underutilized technology investment**

An upcoming Project or initiative

- **System upgrades**
- **System migrations**
- **New technology implementation**

Building relationships via consistent prospecting and profiling will allow you to build a healthy pipeline and advance opportunities more quickly through the Selling Framework to Closed/Won.

There are four primary Categories of Profiling:

☑ Profile the Person
☑ Profile the Department
☑ Profile the Company
☑ Profile Past Training Experience

Engage contacts in conversations about themselves and their business. → Uncover information on:
- Person
- Department
- Company
- Past Training

→ Identify ***Potential Opportunities*** that New Horizons can solve.

The aeWizard provides profiling questions that can help direct the "flow" of conversations with clients and prospects.

Chapter 5 The Sales Cycle Selling Activities

Section 5.1 The Prospect Stage

Section Key Terms

Prospecting	*All selling activities designed to stimulate a new contact's or new company's interest in New Horizons.*
Lead	*A person or entity who may have an interest in either addressing the underlying business issue which your service addresses and/or your specific service.*
Influencer	*A contact not directly involved in making the purchasing decision, but whose opinion may influence the purchasing decision.*
Applications Training	*How New Horizons refers to training that applies to computer end-users or business skills training.*
Technical Training	*Training that applies to those in or desiring to enter the technical field and applying to back-end operations such as servers, network devices, or virtualization.*

Prospecting are all those activities that you do to engage a Contact in a conversation. Defined as the "*Process for stimulating interest or creating demand for your products and services,*" prospecting includes non selling activities such as researching a company, clearing contact names from your data base to ensure other AE's are not responsible for the account; and the selling activity of calling contacts. Other methods of prospecting include:

- Invite them to a seminar or class
- Introduce them to a product or program
- Send an email with a promotional offer

Your goal in prospecting is to capture someone's attention, so that they will allow you to Profile them. You will likely spend the majority of your day Prospecting. Therefore, it is critical that you learn to control this important activity and perform your steps ensuring that you will continue to build opportunities in your pipeline.

Within the Selling Framework, Prospecting is the stage prior to entering the Qualify phase. The Prospecting procedure used to increase successful engagements is:

The most prevalent form of prospecting is making phone calls to prospective clients. These outbound phone calls can be either '*cold*' or '*warm*'. A cold call is an unsolicited outbound telephone call to a prospect or an inactive account. A warm call is either a telephone call to a contact that has expressed interest in purchasing, or a telephone call into an existing account.

The Prospecting stage ends when you have successfully reached a contact and they have agreed to an ACTED activity. An ACTED activity is one where the contact agrees to Audit a Class, attend a Class, Tour your Center, attend a special Event, or receive a Demonstration of one of your virtual offerings. We will discuss these in depth later in this manual.

5.1.1 Prospecting Metrics

The outcomes used to measure your Prospecting performance are:

- Number of calls
- Talk time
- Meetings scheduled
- Meetings conducted
- Contacts added to the CRM
- Accounts added to the CRM

Lead Lists & Lead Generation

Lead generation is a marketing term referring to the creation or generation of desire in our products and services by a potential customer. Typically, this is manifested and measured by an inbound telephone call or email requesting further information. Trade shows, advertisements of services, local web promotions, and email mass mailings are typical tools to generate leads.

Generating "Lead Lists" is the task of compiling a list of prospective accounts.. In addition to using leads gathered from the Lead Generation activities, there are multiple sources for capturing leads and one or many may be employed by your center. These sources include:

Lead Method	Source
Corporate Lead Engines	One Source Dunn and Bradstreet Hoovers Book of Lists for National and International Companies
Local Company Listings	Yellow Pages Local Chamber of Commerce website
Local Events	Trade Shows Industry Associations Chamber of Commerce participation
Partner Referrals & Partner Events	Vendor Partnerships Staffing or Consulting Partnerships Channel Partners (Value-Added Resellers, etc.)
Publications	Industry Journals Classified Ads
Social Media	Linked In Facebook Twitter Xing

Lead Clearing

Part of researching your accounts includes clearing the lead. A cleared lead is one that you confirm does not currently exist in the CRM, is not active or assigned to another Account Executive. Each day, you are required to compile a list of at least 50 cleared leads that you plan to contact.

To clear a lead:

- Enter the company name into the CRM to confirm that it is not already active.
- Enter the company address into the CRM to confirm that the company has not been entered with a different name.

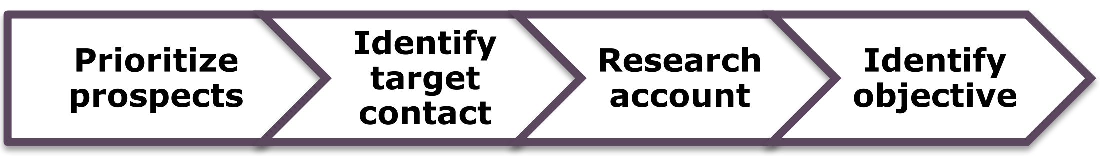
Account names must follow the naming convention listed in Appendix 5. An example of the naming conventions you must use is: A.B.C. Box Company must be entered as ABC Box Company.

Reference **Appendix 5 <u>Account Naming Conventions</u>** guidelines.

5.1.2 Call Planning

The purpose of every prospecting call is to Advance customers to ACTED with a specific date, time, and action item. Plan all outbound calls and act upon inbound calls with this goal in mind.

An efficient and effective Call Planning Methodology is:



Prioritize Your Prospects

Prioritize prospecting calls by account tier and/or potential opportunity size.

Priority	Prospect Type
1 – High Priority	Tier 1 Accounts Strategic Prospects
2 – Medium Priority	Event-driven Leads
3 – Low Priority	Cleared leads

Identify Your Target Accounts

Identify which **companies** you want to call within your priority accounts and research them to help you prepare your opening statement. Next, determine what **departments and individuals** you would like to profile.

Company

The account type will help you determine the proper allocation of time you spend on call preparation and research. Identify the type of account that this company represents:

- New Lead Prospect
- Top Tier Account
- Active Accounts
- Stale Account
- Strategic Prospects

Department

Determining which department you plan to profile depends on the type of account you are calling.

New Prospects

When attempting to penetrate a new prospect, history has shown us that the best departments to start with are:

- Information Technology (IT)
- Human Resources (HR)

IT Department

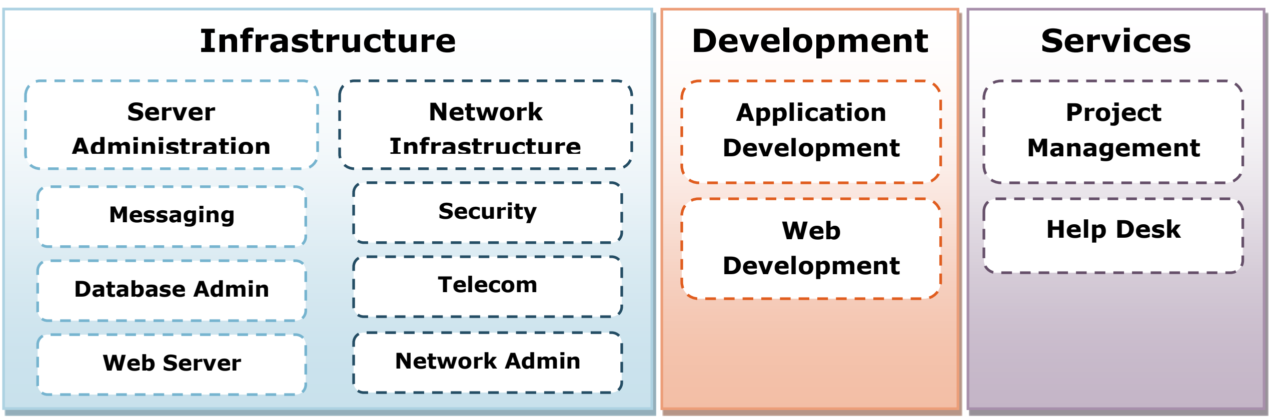
The IT department is the nerve center of all organizations. In today's information age where information and knowledge provides the competitive differentiator and dictates the rest of the organization's well-being, staffing IT roles with right skilled people and providing continuous professional development for retention and growth is key to a successful IT department. Technical Training is generally required to maintain four essential functions within the department:

1. Staffing IT functions, i.e. , providing help desk support, and building the essential IT business processes
2. Building the technology infrastructure to support the organization (Internet connectivity, desktops, servers, applications, website)
3. Building and supporting the business applications and systems critical to the organization (financial, CRM, ordering, telecommunications, learning management)
4. Delivering on strategic initiatives as required by the organization (change initiatives, repairs and upgrades, ecommerce, etc.)

You must have an understanding of the staffing, technology, applications used, and strategic initiatives of the IT department for every Tier I account in your portfolio. This is important because IT is:

- The most robust department (multiple roles and functions)
- A consistent growth sector
- More than half of New Horizons' revenue
- Certification-driven
- Has the highest price tag on solutions

The typical structure of an IT department is as follows:



Your Sales Manager will decide if you have to carry out that level of comprehension of inner workings of the IT department for your Tier 2 & Tier 3 accounts.

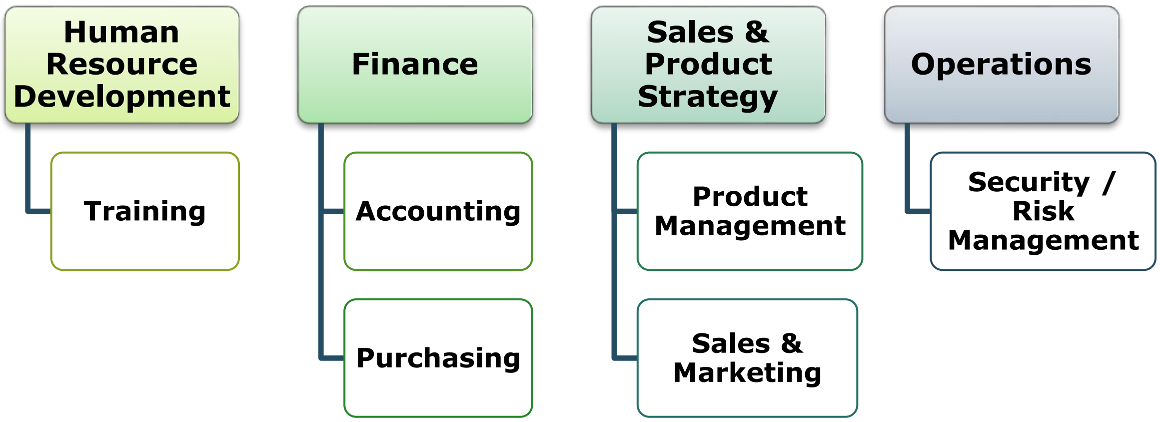
HR Department

The Human Resources Department usually manages the process of recruiting, hiring, compensating, training, evaluating, promoting, retaining, and terminating employees (centralized).

If training is de-centralized, managers in other departments will consult with HR when they identify a need that requires training. If you can develop a relationship with Decision Makers in HR, you may see many referrals when employees need training.

Other Departments

Other good departments to call include:



Determining Your Desired Contact

Contacts within an Account can be classified as one of three four types: a Knowledge Worker, an IT Pro a Decision Maker or an Executive. Their training interests can span from applications to technical and/or business skills.

Contact Type	Description	Role in Opportunity
Knowledge Worker	A person who works exclusively with information; directly applying a technology	Can help identify issues Can influence the decision to purchase
IT Pro	Short for IT professional, these include developers, network and server administrators & engineers and project managers	Similar to Knowledge Worker
Decision Maker	Manage teams of employees	Has the authority to make a purchase and sign an agreement
Executive	Provide strategic guidance	Control the allocation of budgets

Applications

Applications and Business Skills training improve employee productivity and maximize technology investments. Opportunities typically arise from recent projects, such as upgrades or migrations. When you sell applications training, it is generally best to ask for the Decision Maker. Decision Makers typically are directly involved in annual/quarterly skills assessment and performance reviews of each employee and thus provide a quick 'pulse check' of the office workers skills set. You build to the Decision Maker through your profiling activities of a Knowledge Worker. By understanding the challenges faced in technology by the Knowledge Worker, you can better assess the Decision Maker in applying our solutions to the company's business issues.

Technology

The best way to reach a Decision Maker when selling high-end technology training is to work through a Knowledge Worker. You will find that the Knowledge Worker:

- Can be an opportunity influencer
- Is easier to reach than decision makers
- Will provide more information about their department and company
- Is likely to be the student taking the training, thus have a vested interest

The aeWizard is New Horizons' digital profiling & call planning tool to help you ask Profiling questions for a variety of job roles and departments.

Account Research

Prior to contacting a Tier I prospect you should conduct some research: Internal and External. You can conduct internal research via your CRM to see if we have trained the company in the past. Externally researching companies can have a tremendous impact on your success rate when calling into accounts and strategic prospects. Researching accounts can also be a very time consuming process. The following guide will help you determine how to prioritize your research time.

Priority	Prospect Type	Research Activity
1 – High Priority	Tier 1 Accounts Strategic Accounts/Prospects	Review account notes Online research
2 – Medium Priority	Event-driven Leads	Know the topic of event attended Go to company website
3 – Low Priority	Cleared leads	Go to company website

Researching first-time calls into Tier 1 Accounts/Strategic Prospects should include:

- Contact names
- Contact titles
- Industry in which the company operates
- Product or service the company sells
- Number of locations
- News and press releases
- Industry related issues
- Company Initiatives
- Mission Statements
- Employment Opportunities

Enter all information gathered into your CRM.

Research for subsequent calls into Tier 1 accounts/Strategic Prospects should be limited to a *quick* internet and CRM search that lasts no more than five minutes and focuses on any news, press articles or industry related issues that might help you open the call.

Perform a limited review of the company's website prior to the call to confirm basic, foundational information for all other medium to low priority calls.

5.1.3 Prospecting Messages

At New Horizons, we have many ways of prospecting, but for our purposes here, let us explore four of the most common:

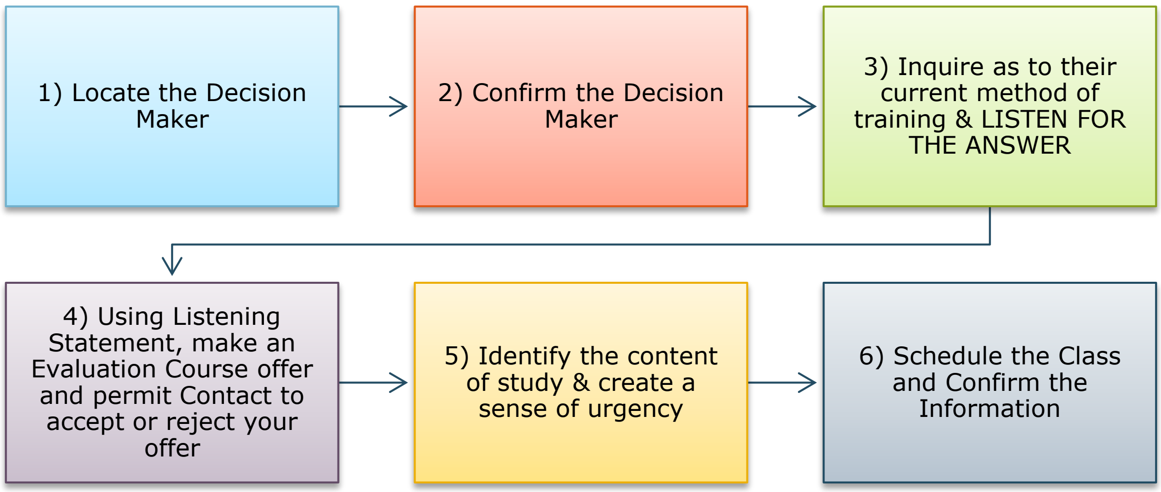
1. Evaluation Course Offer
2. Marketing Event
3. Product/Program Marketing
4. Business Issue/Referrals

If successful in prospecting, you will effectively generate enough interest in New Horizons for the contact to agree to speak with you and you will begin Profiling the individual to whom you are speaking.

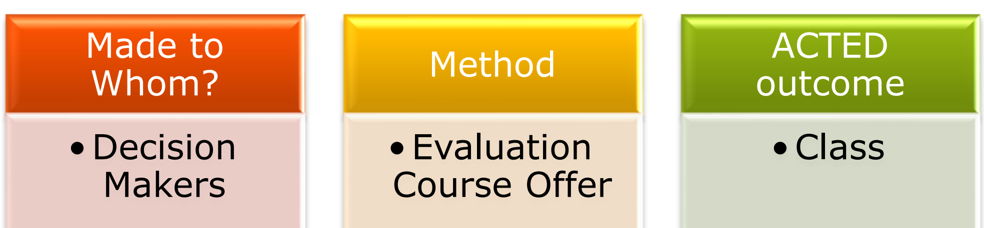
1) Prospecting using the Evaluation Course Offer

The Evaluation Course Offer is the original method of prospecting at New Horizons. It is a proven and well-established method of building market share and enticing trial. In essence, this is a 'demonstration close', you are trading away one of your Application courses in exchange for information and time with the Prospect.

The steps to execute an Evaluation Course Offer are simple; there are six steps to memorize:



Training on Computer technology is still ad hoc for many users. A chance to evaluate, a 'test-drive' of sorts, is a simple way of alleviating the risk factor. A training evaluation coupon, which expires shortly, creates a perceived value for the customer. Assuming they attend your class, they can gain confidence in you and your product. They see that you are confident enough to give them a sample product before you ask them to pay for anything. If they accept, many contacts are willing to begin sharing their business challenges with you, thus you can begin Profiling.



Using the ideal scenario for an evaluation offer, your talking script might sound something like the following:

Step 1: Locate the Decision Maker

***You**: Hello, I'm calling from New Horizons Computer Learning Centers; may I speak to the person who makes decisions on computer training for your company?*

***Contact**: I'm not really sure who that would be*

***You**: If someone in your company has a question about how to do something in a software package, whom do they usually ask?*

***Contact**: Oh, that would be Pat Smith, one second I'll connect you.*

***Contact**: Pat Smith*

Step 2: Confirm the Decision Maker

***You**: Mr. Smith, my name is Elizabeth Wigglesworth, I'm calling from New Horizons Computer Learning Centers, I understand that you are the person who makes the decisions concerning computer training in your company, is that correct?*

***Contact**: Yes, that is correct, how may I help you?*

Step 3: Inquire as to their current method of training & LISTEN FOR THE ANSWER

***You**: Well sir, I won't take too much of your time, could you tell me how have you handled computer training in your organization in the past?*

***Contact:** Well frankly, we don't do much computer training, anything anyone needs I usually handle.*

Using Listening Statement, segue into the Evaluation Course offer, and then permit Contact to accept or reject your offer.

***You:** (Using the listening statement): That's understandable; many of our clients previously also handled the bulk of their own training. Mr. Smith, if I was to offer you an evaluation course, free of charge, so that you could evaluate our method of instruction, support and services, would you accept?*

***Contact:** A free course? Well, that's hard to pass up. But what's the catch?*

***You:** No catch Mr. Smith, other than a little bit of your time to see if we can help you with your IT related training issues. If we can't, no problem we're proud of our services and perhaps if not now, down the road you'll remember New Horizons. So, may I sign you up for a class?*

***Contact:** Well it's hard to beat an offer like that, so sure, I'll accept. What class?*

Step 4: Identify the content of study & create a sense of urgency

You: *(beginning to profile) Which would be most beneficial to you in the workplace- a Microsoft Word, Excel or PowerPoint class?*

Contact: *Probably PowerPoint, I do a lot of presentations.*

You: *OK, I certainly want to offer you something that will meet your needs, is this coming Thursday good for you?*

Contact: *Wow, that's quick, got anything a little later?*

You: *Yes of course, it's just that one of our best PowerPoint Instructors is giving a class this Thursday and I was hoping to get you in there. All of our Instructors are exceptional, but this instructor consistently receives high marks from our students, any chance you can make it?*

Contact: *Well sure, let me shuffle a few things around.*

Step 6: Schedule the Class & Confirm the Information

You: *Great! So I will get you enrolled in this coming Thursday's PowerPoint class starting at 9:00am at our location. I'll give you a call on Wednesday to remind you about your class. Do you have few minutes so I can I ask you a few more questions. (continue Profiling)*

Your desired outcome in the Evaluation Course Offering is a Decision Maker evaluating an Applications class or Auditing a Technical class. (The Decision Maker may also opt to audit an Applications class). Another potentially acceptable outcome is a Decision Influencer evaluating/auditing a Class. In this case, ensure that the Decision Influencer can in fact influence a decision and provide you insight into the corporation's IT challenges.

A couple of important points to remember in the Evaluation Class Prospecting method:

1. Offer Evaluations of Application Courses. Normally, we do not offer a full evaluation of a Technical course due to the price/cost structure associated. Evaluation classes are not to be offered 'just to give away a class', they are offered as a demonstration of our capabilities, remember "***We believe in a demonstration close***"!
2. While prospecting using an Evaluation Class, you seek Decision Makers.
3. Select a Course or Content that is important to them. This will help drive the residual sharing of information from them to you, so that you can begin Profiling.
4. Create a sense of urgency and narrow their choice of dates to as close to today as possible. One technique is the presumptive close; say something like "Would weekday classes work well for you, or would you prefer evening or a Saturday class?" Or an alternative close technique such as: "I have a PowerPoint class on July 10 and July 16. Which would you prefer?" (See the Selecting the Class Offering section for more information on this.)

2) Prospecting using a Marketing Event

Prospecting using a Marketing Event approach is similar to the Evaluation Course Offer Prospecting call. You are going to make an offer of value, in this case a Seminar, Webinar or Open House in exchange for time & information with the Contact. It is more typically a prospecting method to use with existing Contacts/Accounts, as it can be a powerful motivator to those Accounts that cannot spare a day to evaluate an Applications course. Event Marketing is not necessarily limited to Decision Makers; Contacts who can influence a decision are also good targets to invite to Events.

The steps you will go through for a Marketing Event are:

1. Review the corporate webinar http://www.newhorizons.com/Webinars.aspx%20 and any local seminar/open houses your Center has scheduled over the next 30 or so days.
2. Search through your list of Contacts/Accounts/technology profiles (if available) to identify Contacts who would most benefit from attending the event and who can provide you insight into their Company's business.
3. Offer them a 'reserved seat" opportunity to attend the Event.
4. Profile!!
5. Collect/verify Contact information & send them an Event location map.
6. On the day prior to the Event, confirm their attendance and set up a time to meet during the Event (if appropriate)
7. Follow up after the Event to see if the event stimulated any opportunities.

An Event offer might sound something like this.

YOU: *Mr. Smith, the last time we spoke you mentioned that you were struggling with certain Security issues within your network. Well, we have a few seats available in a webinar we are offering on "Common security issues with Microsoft Server technologies" next Tuesday. If I can hold a seat for you, could you attend?*

CONTACT: *Sure, thanks!*

YOU: *Great, I thought you might be interested, let me lock that seat down right now before somebody grabs it. By the way any changes to the Security concerns you had last time we spoke? I think you mentioned you were beginning the process of studying whether it would make sense for you to upgrade to the latest Microsoft Server technologies…(Continue Profiling)*

If the Contact is not an existing contact and instead this is a Cold Call the initial part of your script will change slightly:

YOU: *Hello, may I speak to the person in charge of IT security for your company?*

Contact: *OK, I'll pass you to Pat Smith*

Contact: *Smith here*

YOU*: Hello Mr. Smith, I'm calling a few companies in your industry to offer them the opportunity to attend a free Webinar on the subject of ""Common security issues with Microsoft Server technologies" next Tuesday, if I can hold a seat for you, could you attend?*

Contact: *Sure, that sounds promising*

YOU: *Great, give me one second to hold the seat, (pause and reserve seat if it will only take you a moment). Tell me a little bit about your business, what security concerns are you having that this Seminar might be able to answer? (Continue to Profile)*

Your desired outcome in the Marketing Event Prospecting Method is attendance at the Marketing Event by the appropriate Contact. You are seeking to have a conversation about a specific topic, so choose your invitations wisely. A couple of important points to remember about Prospecting using Marketing Event:

1. Select a suitable Event for the Contact. Don't haphazardly offer an Event to everyone in your Contact database.
2. Ensure you have follow up information on Classes that the Event is designed to stimulate. For example if the Seminar is on SharePoint, have ready your upcoming schedule of SharePoint classes in all modalities.
3. PROFILE!
4. Use Seminars/Webinars/Open Houses that are near to today.

3) Prospecting using Product/ Program Marketing

Prospecting using a Program/Product Marketing approach takes a similar path to that of Prospecting using Events. The chief difference is you are seeking to promote a specific Product or Program offering and do not have a date-driven deadline. Your desired outcome also differs slightly as you would expect to offer a Demonstration or an Audit of the Program/Product. For example, if you were focusing on Prospecting using your Mentored Learning modality, your conversation with a Contact might be something like the following:

You: *Hello, may I speak to the person in charge of IT training for your company?*

Contact: *OK, I'll pass you to Pat Smith*

Contact: *Smith here*

You*: Hello Mr. Smith, My name is Elizabeth Wigglesworth and I'm calling from New Horizons Computer Learning Centers. I understand you are in charge of IT training for your Company?*

Contact: *Yes, I guess you could say that.*

You: *How are you currently handling your technical training?*

Contact: *We use Brand X over in Big City*

You: *(Using a listening statement) That's understandable; they are a very reputable company and many of our clients also used them before they partnered with us. Let me ask you a question. Do you find that there are times when you have difficulty sending your employees for training for 3 or 5 days in a row?*

Contact: *Sure, we struggle with that at times; we're not that big of a team so anytime someone is out it is a concern.*

You: *(Using listening statement) We've found the issue of IT teams out for any length of time can be a concern to many of our clients. For that reason we developed a training solution called Mentored Learning which allows students to attend class in a more flexible manner. Microsoft thought so much of the teaching methodology that they awarded us a Technology Innovation Award for developing this unique method. Would you be interested in seeing how this flexible scheduling methodology might solve the training schedule issues for your employees?*

Contact: *I'm not sure, tell me more about it.*

YOU: *Well seeing it in action and experiencing it yourself is probably a bit easier to understand. Could I entice you to stop by our Center sometime this week and we can demonstrate how the process works? I can have a class set up for you, you can go through a complete module yourself and experience how the process works. Any chance you could stop by?*

Contact: *Yes, maybe tomorrow afternoon?*

YOU: *Great. Would 1:30 or 3:00 work better for your schedule?*

Contact: *3pm, that way I can just go home afterwards.*

YOU: *OK, I'll see you here at 3pm. So that I can best try and match this session to something that would match a need of yours, could you tell me a little bit about some of the challenges your team is facing these days? (Continue Profiling)*

Made to Whom?	Method	ACTED outcome
• Decision Makers (of Program/Product area)	•Program/Product Introduction	•Audit,Tour or Demonstration

You can see that the above call is a combination of the Evaluation Course Offer and Marketing Event Prospecting methods. In this case, the offering was Mentored Learning as a flexible training solution, so the offer should be made to the person who is responsible for analyzing new training methods.

However, you could just as easily replace an IT Security training product offering rather than the Mentored Learning program offering. Your Script in this case might sound like:

You: *Hello, may I speak to the person in charge of IT security for your company?*

Contact: *OK, I'll pass you to Pat Smith*

Contact: *Smith here*

You*: Hello Mr. Smith, My name is Elizabeth Wigglesworth and I'm calling from New Horizons Computer Learning Centers. I understand you are in charge of IT Security for your Company?*

Contact: *Yes, I guess you could say that.*

You: *Mr. Smith I'm calling companies today to see how they are handling training in the area of IT security. How do you do this at your company?*

Contact: *We use Brand X over in Big City.*

You: *(Using a listening statement) That's understandable; they are a very reputable company and many of our clients used them before partnering with us. Let me ask you a question. We have a pretty robust schedule of IT Security training courses. Would you be interested in finding out how we might be able to help you further your team's knowledge of IT Security?*

Contact: *Sure, always willing to learn.*

You: *(Using listening statement) Wonderful! We've helped more than 25 million other learners around the world. As the leader in IT Training, New Horizons has over 300 locations in 60 countries. We're the largest training partner in terms of locations for both Microsoft and Cisco, which makes us experts in IT Security. Would you be interested in seeing first-hand how we became the leader in this field?*

Contact: *Sure, tell me more about it*

You: *The easiest way to explain the New Horizons advantage is to experience it. Can you stop by our Center and sit in one of the classes to audit our teaching methodology and spend some time with our Instructors? We have a Security class running all next week-could you come in Tuesday morning?*

Contact: *Sure Tuesday, what time?*

You: *Let's say 8:00am? That way you'll experience the start of the class and get a good overview of the content. Afterwards, I'd love to give you a quick tour of our facility so that you can see firsthand how we treat our students. Will that work for you?*

Contact: *8am, OK great.*

YOU: *Wonderful, I'll see you here at 8am. So that I can best prepare for your visit, could you tell me a little bit about some of the IT Security challenges your team is facing these days? (Continue Profiling)*

4) Business Issue Marketing/Referrals

The final type of prospecting call is one in which you use a Referral or a common Business Issue to lead you into a Profiling Discussion. The technique is similar to the Product and Program call in that you are focusing on a common and perhaps known industry concern. Common examples could be data security or help desk support costs and a multitude of other issues.

This is illustrated for you using an external factor that could impact many of your Contacts' businesses:

You*: Hello, may I speak to the person in charge of ensuring compliance with Human resource laws?*

Contact*: Hmm that would be our Human Resources manager, Pat Smith, let me transfer you.*

Contact*: Smith here.*

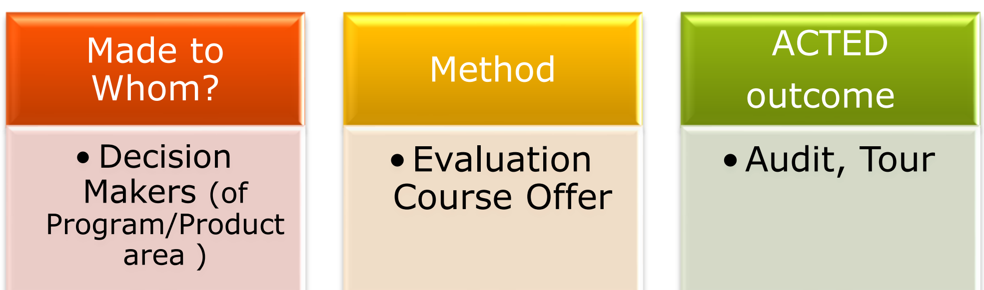
You*: Mr. Smith, I understand that you are in charge of compliance with human resources is that correct?*

Contact*: Yes, I'm the VP of Human Resources if that is what you are asking.*

You*: My name is Elizabeth Wigglesworth, I'm calling from New Horizons Computer Learning Centers. We've worked with other companies in the banking industry (or whichever vertical market the contact belongs to) and helped them implement policies on storing their email communications. How are you adapting your email policies to manage communications in response to the recent ruling on the admissibility of email history into litigation?*

Contact*: What? No I haven't heard of this ruling, what do you mean?*

You*: (Listening Statement) Don't be alarmed. It's not unusual that our clients have not heard about this issue and that is the reason for my call. We have assisted other companies such as XXXX & YYYY with setting their email policies merely by training them in our Microsoft Exchange curriculum. …do you have a few minutes to maybe explore how we might help your company with this?*



As a new Account Executive, this is a difficult Prospecting method to master. In order to talk about common business issues, you will have to be educated on what technologies impact distinct business issues. In the example above, we used a recently enacted law to promote a potential 'pain' question with a prospect. Do not let the need to understand the technologies discourage you from using this method! Here is another way of using the Business Issue/Referral style of Prospecting with an assumed Referral:

You: *Hello, may I speak to the person in charge of training for your IT group?*

Contact: *Hmm that would be Pat Smith, let me transfer you.*

Contact: *Smith here.*

You: *Mr. Smith, I understand that you are in charge of IT training for your company. Is that correct?*

Contact: *Yes, I'm the Director of technology if that is what you are asking.*

You: *Great! I won't take too much of your time, my name is Elizabeth Wigglesworth, I'm calling from New Horizons Computer Learning Centers, we are the largest Microsoft and Cisco training partner in the world and on their behalf we are calling a few of the companies in the area to inquire about their technology upgrades, migrations, or technology investments. Would you have a moment to discuss your current IT projects? (continue Profiling)*

Notes on Prospecting

In most of the prospecting methods above, we have mentioned approaching Decision Makers as part of your process. Though ideally this is what you would like to occur, there will be many times when you will approach a Contact within a company to better understand the corporation's issues before approaching a Decision Maker. A general rule of thumb is the bigger the Company, the more likely you will need to profile your Contacts before approaching a Decision Maker.

Listen for the Contact's specific area of interest or need regarding content or curriculum of study. Until you can get them to focus on an area of interest, the wide range of offerings that we have can unnecessarily complicate the discussion. One exception to this focused Content discussion is the Decision Maker who is looking to centralize their training services; this type of opportunity is rare but it occurs. More typically, your Contact will have problems they are trying to resolve and it is beneficial if you can help them focus on that specific issue before addressing larger, more global concerns.

Once you have settled on a specific content area to propose an ACTED activity, use 'Listening Statements' in your conversations. Let your Contact know that you understand what they say by paraphrasing their point of view. For example, if they mention they are happy with their current training provider, you might say: "*I can understand why, they are a top notch outfit…*[7]" A few sentence starters to help you navigate this skill:

- ***"Sounds like****…" your staff's not up to speed in implementing your company's technologies due to time constraints.*
- ***"Seems like****…" you're struggling with IT Security, much like many of our customers.*
- ***"It appears*** *…" you've got a good idea on how you're going to handle that upgrade*
- ***"Looks as if****…" our Mentored Learning methodology might be the flexible method of learning you've been seeking.*

Prospecting is your key to success. You are expected to have 50 cleared leads available to prospect each morning as well as any time throughout the day when you do not have scheduled meetings or other activities to perform.

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[7] *It is rarely a good idea to speak of competition in a negative tone. Remember if you insult the competition you are indirectly insulting the Contacts decision making. Rather praise them as 'good competition' and be humble in seeking to get a commitment to explore opportunities where the competition might not offer as much as you.*

5.1.4 Selecting the Class Offering

New Horizons offers more classes at more times in more learning modalities than any other company in the world! Choosing your proposed ACTED activity with a Prospect can become daunting. After all, where do you focus? Do you focus on classes available when the customer wants; or on Mentored Learning classes, offered whenever a qualified instructor is available?

To help you counteract this dilemma and after having selected the Content focus, go through the following progression:

5.1.5 Priority of Offerings[8]

TILT

Is a Traditional Instructor Led Training (TILT) class offered in the Center this month?
*If yes, prepare to offer TILT **A**udit or **C**ourse.*
If no, move to next method.
Verify that the client has not presented an objection to TILT before offering an audit.

OLL

Is YOUR center delivering an Online LIVE (OLL) class within the month?
*If yes, prepare to offer OLL **A**udit/**D**emo.*
If no, move to next method.
Verify that the client has not presented an objection to OLL before offering a demo.

ML

Is a Mentored Learning session (class start date) available within the month?
*If yes, prepare to offer ML **A**udit.*
If no, identify if your center offers TILT, OLL, or ML. Offer next available audit.
If no, move to last method.

OLL/OLA

Is there a OLL course offered by another center or OLA course available?
*If yes, prepare to offer OLL or OLA **D**emonstration.*
If no, offer to discuss options with management for custom or private event.

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[8] *Some centers lead with a Mentored Learning offering, however the time-sensitive modalities of TILT and OLL should take priority in filling enrollment.*

Focusing your energies on this progression of ACTED activities will help you shorten your sales cycle and better serve your Centers offerings. We begin by filling open seats, offered in the current month, in our Traditional Instructor Led Training courses; and then progressing to any Online LIVE courses that your center is delivering.

All Instructor Led Training Classes (TILT, OLL and Mentored Learning) have seats that are ‘perishable’. Once the class has started, you can no longer fill the seat. Any seat that goes unfilled is a lost opportunity for revenue. Since TILT and OLL have set start times and end times for classes, they are schedules are more ‘perishable’ than those of Mentored Learning. Therefore, focus first on TILT, then OLL before moving to a Mentored Learning class solution.

The Priority of Offerings Progression will also serve you well not only while Prospecting, but later as you begin Building & Presenting Solutions. To summarize the various Prospecting methods, the desired ACTED outcome and a starting talk script, refer to the following:

	Product or Event Marketing	Profiling Stale Accounts	Prospecting New Business
Prospecting Message “Hi, I'm xxx from New Horizons Computer Learning Centers. I’m calling because…	… we have recently introduced *xxx* offering and many of our clients in the *xxx* industry are having great success."	… your company has worked with New Horizons in the past and I want to determine what's changed in the past few months."	… we have been helping other *xxx* companies improve productivity and reduce downtime."
Desired Advance *Your offer, if the client gives permission to proceed.*	"I'd like to offer you the opportunity to experience *xxx* and find out how it and New Horizons may be able to help your organization."	"I'd like to take a few minutes to talk about some changes that we have seen with other clients and see how your addressing them."	"I'd like to gain a better understanding of your organization and offer you the chance to evaluate our services."
Planned Offer/ Desired Outcome	Event or Audit	Tour (Meeting)	Audit, Course, or Demo

5.1.6 ACTED

The goal of every call is get an Advance to ACTED. The three components of an Advance are getting a prospect to commit to a specific date, time, and action item. Only ACTED accounts can be added to an Account Executives portfolio. ACTED is an acronym that stands for:

Audit	•Mentored Learning •Technical Course
Course	•Evaluation •Initial Purchase
Tour	•Center Tour •Meeting
Event	•Seminar •Executive Briefing
Demo	•eLearning •Learning Management

Audit

Audit is an activity that allows the prospect (Decision Maker) to sample a high–level technical class for a few hours to better understand how our services can benefit his company or employees.

Course

Course can refer to two types of activities that can afford you the chance to obtain more information to uncover and develop future opportunities:

Course evaluation Similar to an Audit, but longer in duration, a prospect attends a one-day applications class at no charge to evaluate our services.

Course purchase is typically transactional and often the result of an inbound call or Prospecting.[9]

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[9] *In this case, 'Course" also extends to the virtual training solutions such as Online LIVE! or Online ANYTIME.*

Tour

The Tour can be any scheduled meeting with a Contact used to gather information to uncover a potential opportunity; but in general applies to the in Center Tour of your facility. More specific instructions on conducting a Tour of your Center are addressed in Conducting a Center Tour.

Event

An event is a value added Seminar, executive Briefing or Webinar that the prospect agrees to attend. Events are popular with customers and are a good way to help you build relationships and uncover additional needs. These events focus on a particular business topic of interest to a large population of customers.

Seminar

Seminars are short, professional presentations (events) that give potential Decision Makers in your market the opportunity to explore and examine relevant industry themes and/or vendor products, which can provide future training opportunities for you. Seminar events generally take place at your center.

Webinars

Webinars are free training events sponsored by New Horizons Corporate conducted over the internet. They are an opportunity for business Decision Makers, training professionals, IT professionals including developers, network and server administrators, engineers and project managers to see and hear about the value latest technologies can bring to their organizations on such topics as IT training, information security, graphics and design, business skills, and office productivity.

Demo

A Demo, or demonstration, visually shows a prospective client the merits of our products and services. Some of our products and features are easier to understand once the contact has viewed and/or experienced them. Demonstrations are available for Online LIVE, Online ANYTIME, Learning Port, Measure Up, and Mentored Learning.

When leaving a voice mail message, modify your version of your Opening Statement to include useful information for the contact. For example, news, advice, upcoming event, along with a request to return the call.

5.1.7 Stage Transition Activities

You are ready to move to the **Qualify** stage of the Selling Framework when you have:

- ☑ Reached and talked to a Prospect Contact within a department
- ☑ Gained the Contact’s permission to ask profiling questions

Section 5.2 The Qualify Stage

The goal of Qualifying within the Selling Framework is to Identify that the prospect has a business issue or opportunity that can be serviced by New Horizons. It is in this stage that the Contact is added to your CRM and the sales opportunity entered into the pipeline.

Isolating a Problem, Potential for improved Performance or a Project may not mean that the client is ready to solve their issue. Do NOT assume that because they have identified an issue they will see the value of your solution. Continue to Qualify and Explore Needs until you to convert to a Real Opportunity.

5.2.1 Qualify

The Qualifying phase consists of asking questions that will ensure that the contact is interested enough in your solution to advance.

Qualifying allows you to prioritize your opportunity, thus you can begin identifying the probability of Closing based on the scope of the opportunity, your competitive position, or the client's desire or ability to buy. Properly qualifying your opportunities prevents you from wasting time on activities that will not achieve the desired results.

Utilize the Profiling technique to ask questions that refine the potential opportunity that lead the contact to agree to move forward. These questions will also help to identify what potential objections there may be to your solution. Before you can qualify an opportunity, you must first be able to define:

1. If there is a business issue that can be solved by a New Horizons offering?
2. Has budget been allocated to resolving the issue?
3. Do you have access to the Decision Maker?

Qualifying sounds like:

- Other than you, whom else do I need speak to about this opportunity?
- Do I understand that you need a firm proposal by tomorrow? What is driving this tight deadline?

5.2.2 Stage Transition Activities

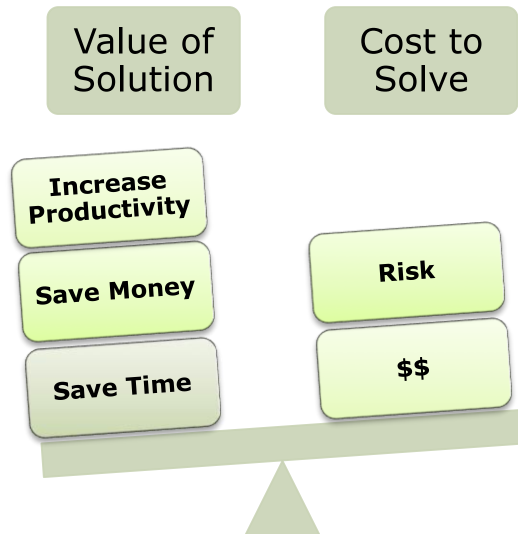
Opportunities progress from the **Qualify** stage to **Explore Needs** only if you have answered "*Yes*" to the following questions:

- ☑ Does the company have a business problem that New Horizons can solve with our product and service offerings?
- ☑ Is your contact confident that New Horizons has the capabilities to help them solve their business problems?
- ☑ Is your contact the person who "owns" the problem? If not, are they willing to arrange a meeting with this person?
- ☑ Does your contact have the authority to solve the problem? If not, are they willing to arrange a meeting with this person?
- ☑ Does the contact have the budget and the urgency to solve the problem within a specified period?

Section 5.3 The Explore Needs Stage

Needs Questions help create the emotional connection for the prospect on what it would mean to either succeed or fail. You help the prospect see success on both a professional and personal level. Explore Needs questions consist of asking pain, consequences, and needs conversion questions, progressing seemingly trivial problems into critical issues and transforming potential opportunities into real ones.

Clients will only purchase when the value of the solution is greater than the cost required to solve the issue.



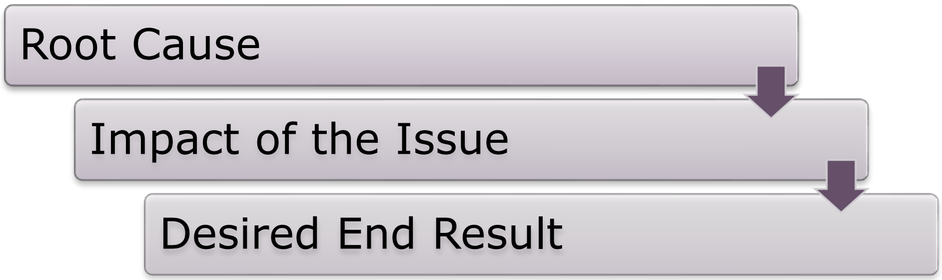
Through a thorough exploration of your client's needs, you can better establish the value of the solution and the vision of success.

Customers buy for two reasons: emotional reasons and logical reasons. The majority of sales professionals do a great job selling to the logical side of buyers, but many studies indicate that it is the emotional side of the purchase that will win you brand loyalty.

If you explain only the features and advantages of your training solutions, you are tapping into the logical side of the sale and perhaps miss the more important emotional side. To avoid this, remember that the buyer is a person trying to solve a problem

Once you find an opportunity or a situation where you think training can help, you begin asking needs questions that address the prospect's problems and its impact on their business. This is the time to emphasize the problems or needs in the mind of the prospect via pain, consequences, and needs questions. Pain propels action and creates a sense of urgency to solve the problem.

Exploring Needs requires that you do not just understand what the problem is; for example, '*we are having problems with Network Security.*' It means understanding:



So, if your contact has expressed a problem with Network Security, you can ask:

- ROOT CAUSE: '*Have you been able to isolate what has lead to this issue?*'
  - An affirmative response helps you to isolate the actual issue that needs resolution.
  - A negative response also tells you that the actual issue might be the ability to diagnose the problem.
- IMPACT OF THE ISSUE: '*What business impacts have these security breaches had on your department and others?*'
  - Quantifying the impact of the issue beyond the scope of the contact's direct impact will build the case to resolve the issue.
- DESIRED END RESULT: '*How would you have ideally addressed this issue?*'
  - Knowing what the vision of success looks like will allow you to craft a solution that specifically addresses their desired outcome.

Convert opportunities to a Real Opportunity by asking pain, consequences, and needs questions from the aeWizard "Opportunity" Category.

During the Explore Needs stage use Opportunity Assessment questions to serve as an internal gauge for you and your management to determine whether this opportunity is worth pursuing.

Reference **Appendix 2** for more **Opportunity Assessment** questions to determine if an opportunity is worth pursuing.

5.3.1 Stage Transition Activities

Opportunities leave the **Explore Needs** and enter the **Build and Present Solution** stage when the following conditions have been met:

- ☑ Completed Opportunity Assessment
- ☑ The Client has acknowledged and stated the business and training problems they want to solve
- ☑ The Decision Maker has confirmed that he is willing to take action to solve the problem
- ☑ The Decision Maker has agreed to explore a solution and receive a formal proposal

Section 5.4 The Build and Present Solutions Stage

The Build and Present Solutions stage transitions the conversation with the client from discussing issues (3Ps - problem, performance, and project) and their impact on the business, to discussing Solutions to the issues. Your goal is to develop a solution that convinces the customer that you completely understood their issues, will solve their identified problems and moves the customer to take action quickly. A "solution" is a combination of products, services, and support that fulfills your contact's business and training needs. Solutions can range from simple (such as a class for one or two employees), to complex (such as a custom blended learning program that is national or international in scope). Building a solution for a contact requires that you have:

- A thorough understanding of the Client's needs
- Knowledge of what New Horizons is capable of delivering
- The ability to match what New Horizons can deliver with what the contact needs
- Taken the measures necessary to present a solution that fully articulates the benefits for your contact

You should be prepared to address these Pre-Proposal Considerations prior to preparing a proposal:

- Do you have all of the required background information on the business issue to create a solution?
- Can you articulate how the solution can solve the client's problem?
- Can you articulate the benefit of the solution to the client?
- Have you met all of the client's decision-making criteria?
- Does this opportunity require a preliminary implementation and support plan?
- How will you present the solution? Who will be present?
- Is there competition?
- Do you know the competitor's strengths and weaknesses and can you offer a competitive advantage?

In order to complete the Build and Present Solutions stage you will need answers to Business/Administrative questions about how the customer processes their purchases. Secondly, so that you can better position the New Horizons solution to the customer, you need to begin seeding our unique differentiators using Integrated Learning questions.

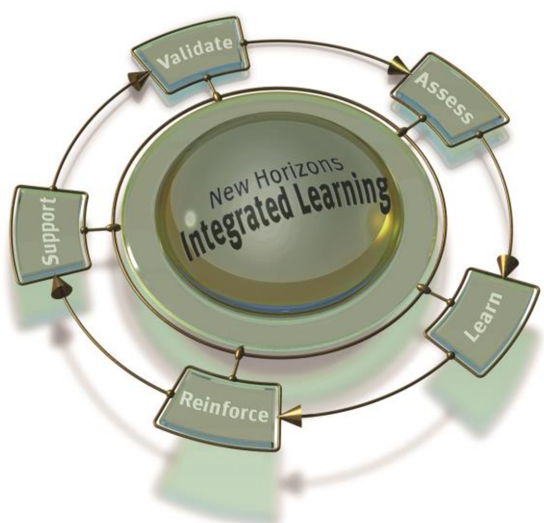
5.4.1 Business/Administrative Questions

The purpose of Business/Administrative Questions is to clearly identify your contact's buying criteria, budgets, and timelines for training. Business/Administrative questions sound like:

- ☑ What buying criteria does the contact have? (Quality, Service, Price)
- ☑ What is the approval procedure?
- ☑ What is the contact's budget for the project?
- ☑ What timelines do they have for implementation and why?

5.4.2 Integrated Learning Questions

Integrated Learning is the New Horizons training strategy that comprehensively and holistically guides adult learners through the five components of the learning life cycle: Assess, Learn, Reinforce, Support and Validate. You ask Integrated Learning Questions to better present our solutions once we build a Proposal.



Within the Sales Cycle, Integrated Learning questions relate to your contact's specific requirements around the components of the Integrated Learning lifecycle. Integrated Learning Questions will help you leverage the benefits of the New Horizons offering.

Refer to the **NHU LMS** (http://nhulms.newhorizons.com) for more training on Integrated Learning.

You can use the components of the Integrated Learning 'wheel' to remind you what component of Integrated Learning you are asking about.

Assess

Use questions that determine the client's preference on:

- Placing a student appropriately in the right course based on their skill level.
- Determining a baseline to the impact of the training using a pre and/or post-assessment process and measure ROI.

Questions on the Assessments sound like:

1. *"Would you say that the people that would be attending this training are all of an equal skill set, or do you have a variety of skill sets?"*
2. *"Do you need to pre-assess skill sets in order to place students into the appropriate course based on their skill level?"*
3. *"When looking at this course outline, what specific skill set do you believe will have the biggest impact on your employee's productivity?"*
4. *"Would it help you if we were able to measure the skill set difference between pre-course test results and post-course test results?"*

Learn

Questions in the "Learn" phase of the Integrated Learning questions help you begin seeding the differentiators in New Horizons business compared to competitive offerings. You will determine the client's course outcome expectations; begin identifying the learning modality you will propose based on the learning style and course content, as well as any class logistics requirements for the training.

Learn Questions sound like:

1. *"Who needs the training?"*
2. *"How many students do you anticipate will attend?"*
3. *"Is the delivery at your site or here in our center?"*
4. *"If offsite, where will training be held?"*
5. *"What is your preference for how the training is to be delivered?"*
6. *"Have they used e-learning in the past? If so how did that work?"*
7. *"Would it help if the class schedule were flexible around the specific student's schedule?"*
8. *"How far will the student have to travel to come to class?"*
9. *"Can all the students attend at the same date and time?"*
10. *"What will happen if certain employees are away for (1-5 days) while at training? Would it be useful to have a schedule that allowed the student to train part time and still do their work?"*

Reinforce

You use Reinforcement themed questions to begin promoting New Horizons ability to support students after the class with items such as post course references. Post-Course Resources to reinforce content, which can include:

- Courseware
- Post-Class Learning Key (Apps. Classes)
- Online Anytime classes and Tutorial Libraries
- Integrated e-reference library
- Virtual Labs that provide hands on practice (if applicable)

Reinforcement questions sound like:

1. *"What sorts of materials do you make available to your employees as a post-course reference?"*
2. *"How will you ensure that the students will retain as much information as possible?"*
3. *"Do you provide your people with a test environment to practice what they have learned?"*

Support

Use support questions to identify your client's preference for special requirements such as:

- Tracking progress for individual student learning plans
- Creating customized learning plans for each student
- Special billing
- Special reporting
- Private classes that contain only one company's employees
- Special registration needs

Support questions sound like:

1. *"Will you need to produce a report for your students showing their progress against plan? "*
2. *"I understand you requested two billings, is that due to budgetary constraints or purchasing limits?"*
3. *"Do you need us to track which students from Plant A versus Plants B & C attended their classes?"*

Validate

You use Validate questions to determine the client's preference for quantifying the impact of the training as it links to solving the business issue and determining its return on investment (ROI).These questions prepare a path for you to follow up after all training is complete so that you can validate all their needs were met. Remember, most contacts are not experts in training. By asking these questions, you are showing them how to prove their investment in your training. They help establish you as their expert, their training consultant and a true valued partner in their business.

Example of validate questions are:

1. *"What are your key success criteria, how will you measure the results of these trainings?"*
2. *"What is your vision for a successful outcome?"*
3. *"How will that affect your business?"*
4. *"How can we measure that impact?"*

5.4.3 Determine the Initial Solution

Define the initial solution and initial deployment strategy using the information you've gathered and work with others in your center, including your Sales Manager, Training Manager, and Operations Manager, to build the appropriate solution for your client's needs. For larger or more complex solutions, you should also create a preliminary implementation plan further the client discussion.

Your proposal should always begin with a Value Proposition that provides a clear statement of the tangible results a customer gets from using your products or services and should be included in your proposal. The more specific your value proposition is the better. An outline for writing a Value Proposition is:

- Company Name: *XYZ Box Company*
- Will realize specific business impact: *increased employee productivity or reduced costs*
- By purchasing/implementing the New Horizons' recommended solution: *Course Name*
- Beginning implementation date: *within next 30 days*
- Resulting in improved 3Ps: *security problem*
- By timeframe: *within 90 days of completing training*

Conclude the Value Proposition with your center's agreement to provide the required support, implementation, and reporting requirements.

5.4.4 Build the Proposal

For any sale that is not a transactional sale, you will likely need to submit a proposal. You will want to build a compelling case for our services. The proposal aims to document your suggested agreement with the client to on the products and services they are to purchase In general, a proposal should consist of:

1. The Value Proposition that summarizes the problem and your proposed solution
2. A main body that explains the details of what you are proposing
3. A conclusion that emphasizes how your solution will benefit your client
4. Estimated Cost

The length and complexity of your proposal will vary based on the expectations and the requirements of the client. Some examples are:

Proposal Type	Use when…
Formal Proposal Document	• Client submitted a Request for Proposal (RFP) that you are responding to • You are in a competitive situation and need to provide added differentiation • Client requested specific supporting references, customer testimonials, an executive summary, course evaluations, customized course outlines, a detailed implementation plan, or internal marketing support
Order Acknowledgement / Contract for Services	• Less complex solution • Repeat customer • Client has given verbal approval and needs to officially authorize purchase
Verbal Presentation In conjunction with one of the above	• Very complex solutions • First time providing a solution for a Tier 1 client

The Contract, or Order Acknowledgement, component of the proposal is the official binding agreement with the client and must contain the following:

- ☑ Company Name
- ☑ Contact Name
- ☑ Value Proposition
- ☑ Scope of Services
    - Coupons, classes, eLearning
    - Number of students
    - Special requirements
- ☑ Costs
- ☑ Payment Terms
- ☑ Limits of Liability (determined by your center's local legal counsel)
- ☑ Signature or Instructions for Execution of Agreement

For transactional sales, formal proposals are not typically required, but you will still need to submit a contract or order acknowledgement.

Reference **Appendix 3** for sample **Proposal Templates**.

5.4.5 Review the Initial Solution with the Client

Schedule a phone or in person meeting to review the contents of the proposal. For opportunities with Strategic Prospects or Tier 1 accounts, conduct the meeting in person. This allows you to connect with the contact and adjust your presentation based on the non-verbal clues you cannot see over the phone. It is possible that your opportunity will require more than one meeting, if your contact requests changes to your initial solution.

As with all sales meetings, this meeting must have an agenda and planned outcomes. The agenda needs to include time allotments for the following phases of the meeting:

- Opening Introductions
    - Who is attending the meeting from both the client and your center
    - What is their role in the buying process or the ownership of the solution
- Background Review
    - What information brought you to this point
        - Problem, Performance, or Project
        - Vision of success with timeframe and why
    - Confirm that the list is complete
    - Identify any changes since your last conversation
- Discussion of the Solutions and Benefits
    - How does the proposed solution resolve the client's need
    - Ask and answer questions to confirm their understanding of the solution
    - Gain agreement that the solution addresses their needs
- Resolution of Objections and Concerns
    - Identify what needs to be negotiated to ensure closing
- Review of the Next Steps
    - Edit proposed solution
    - Refine negotiated items
    - Escalate to estimated cost

Be prepared to ask the client:

1. *"What is preventing you from making the decision?"*
2. *"How soon will you be making the decision?"*
3. *"What are your next steps with this proposal?"*

Before you close the meeting, ask summary questions that will prepare you for the next stage of the Selling Framework or deliver your proposal and move straight to the Commitment and Close, asking for a signed agreement.

Refer to the section on **Meeting Preparation** for more information.

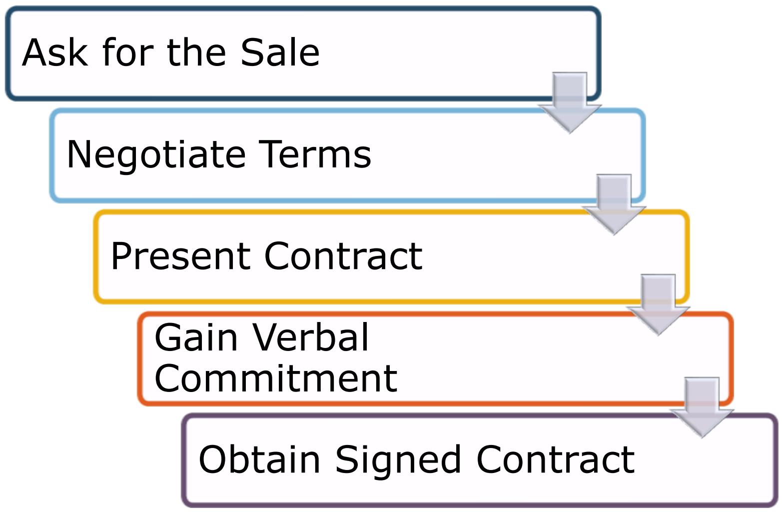
Presenting an implementation outline or detailed plan of how the training will be delivered is a good way of gaining acceptance for the solution, shows that you have thought through the entire process, and confirms our customer's involvement in the success of the training program.

5.4.6 Stage Transition Activities

Opportunities leave the **Build and Present Solution** stage and enter the **Commitment & Close** stage when you have:

- ☑ Built your initial solution and have presented it to your client
- ☑ Addressed and overcame client concerns
- ☑ Obtained the business Decision Maker's approval of your initial solution
- ☑ Determined a next step to gain the contact's commitment and close the sale

Section 5.5 The Commitment and Close Stage



5.5.1 Obtaining Commitment

During the commitment phase, you are demonstrating your ability to deliver on your proposed solution and resolve minor issues in order to gain the client's verbal commitment to move forward towards a signed contract. If you have done your job well through the selling framework stages, you will have presented the client with the right solution at a fair price and will face few objections. However, objections are common and you should welcome them! Objections are often a buying signal, indicating that the client is ready to negotiate.

The three most common objections are price, time, and quality. Before conceding any of the three; establish if the objection is real or if it is merely a negotiation ploy. Start out with a statement such as "*I guess I misunderstood. When you said X was important to you, I structured our offer to consider those requirements. Are you saying that this is not important or this solution?*"

If you must concede a point, there are two strategies to continue to advance the opportunity, offer non-monetary concessions or provide a discount:

1. Non-monetary concessions can include reducing the scope of the solution and timeframe based on budgetary constraints and value-add options such as a money back guarantee, better payment terms, or a credit towards future purchases.

2. Provide a discount. Despite your best attempts to sell value and remain firm on your price, some clients will press ahead with their request for a discount. When negotiating a discount, only do so when the client is willing to trade-off components of the proposal or if they are willing to provide concessions such as up-front payment, providing a testimonial or case study, provide space for New Horizons in their internal newsletter, or provide you with an exclusive vendor authorization. At the very least ask them to sign the agreement with penciled out terms so that you do not have to redo your proposal.

Review and Agree upon Final Proposal

After you have made the required changes to the initial proposal, present the final proposal to the client for their approval. Language in this proposal will be incorporated in to your agreement (contract), so make sure to review everything carefully with the Decision Maker.

Gain a verbal Agreement to proceed with the solution

At this phase, you do not have a signed contract. However, you are negotiating the terms of the contract including scope, pricing and delivery expectations. The goal is to obtain the verbal commitment to proceed to a signed agreement. It is now the time to ask for the sale.

Ask for the sale

"...BASED ON EVERYTHING WE HAVE DISCUSSED, ARE YOU READY TO MOVE FORWARD WITH THIS?"

Account Executives lose substantial sales opportunities because they do not ask for the sale. There are several common reasons why this can happen:

- They do not know how to ask the contact to buy
- They are scared of hearing a "no"
- They feel they are being "pushy"
- They fear hearing and handling objections
- They do not know how to negotiate contract resolutions

Learn to read the buying signals from the contact. They may be waiting for you to lead them to purchase. A good example of question asking for the sale is:

- *"Based on everything you have heard, are you ready to move forward with this today?"*

If the customer says "*yes*", then you have your verbal commitment and you can begin discussing next steps for signing contracts and implementation. If the customer says no, then you have encountered an objection and you will have to clarify whether the objection is real and you have to go back redo your proposal, or if this is just a negotiation ploy.

5.5.2 Closing the Opportunity

At the Close Stage, execute a signed agreement.

Negotiate the Agreement

An agreement or contract should be a "win-win" document that protects the interests of both New Horizons and the customer. Some compromise is normal in the negotiation process. Make sure you understand your authority to modify price, payment terms, guarantees, and other components that could have a financial impact on your center, by checking with your Sales Manager.

Overall Guidelines

- Do not give in on pre-approved concessions too quickly or easily
- Probe to understand any underlying reasons for objections/negotiation
- Say "*No*" strongly if you cannot grant an exception to the concessions. Many clients believe they must hear "*No*" from the vendor to ensure that they are not paying too much
- Understand the **value** of a concession and the **costs** in terms of revenue, expense, or risk — for both you and the client
- As soon as the customer asks for a concession, ask them for something in return.
- Document the negotiations both on paper and in your CRM notes. Put dates and versions on all documents to provide a paper trail. Review meeting notes and documents with the team and customer frequently

Develop and Produce a Signed Contract

A signed contract with specific terms and scope of services and delivery will prevent and/ or protect both New Horizons and your customer should any misunderstandings arise. It is the final documentation of agreement between new Horizons and the Client that the client must sign and date**.** It will specify:

1. What is being delivered
2. How training will be delivered
3. Who will be receiving the training
4. When it is being delivered
5. The cost
6. How it will be purchased
7. What your client's expectations are for customer service

To ensure that the client is aware of all New Horizons policies, your center may have specific agreements for particular types of sales. Sales generally requiring signed agreements include:

- Single Courses
- Clubs
- Coupons
- Onsite Training
- Technical Programs
- Room Rentals

Your Sales Manager can provide samples of these agreements as applicable. Review these agreements so you are familiar with your policies when speaking with clients.

Reference **Appendix 4** for sample **Agreements**.

5.5.3 Stage Transition Activities

Opportunities leave the **Commitment & Close** stage and enter the **Implement** stage when you have met the following conditions:

- ☑ You have obtained a signed, written agreement and submitted the appropriate paperwork
- ☑ You have scheduled the implementation of the training

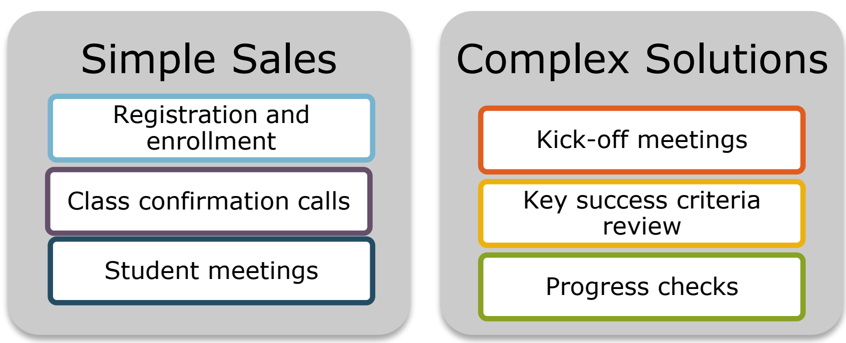
Section 5.6 The Won & Implement Stage

5.6.1 Implementation Stage

The Sales Cycle does not end with a signed contract. You need to ensure that you are serving the customer's needs during implementation and ongoing operations in order to create future sales opportunities and obtain referrals. Customer satisfaction with the New Horizons' experience is crucial for penetrating accounts and meeting your revenue and account growth targets.

Depending on the complexity of your sale, the Implementation stage may be as simple as enrolling the student into a course and scheduling post-training phone calls to determine if the class met their objectives. It may be as complex as a full-scale project management process where you have a series of meetings with the customer for project planning, management, and communication activities. In any of these cases, it is important that you stay in close contact with Decision Makers to ensure that objectives are being met, to prospect for new sales opportunities, and to find referrals within the account.

Implementation Expectations



Simple Sales

Simple sales are those where the selected solution comes from your standard offerings; such as Open Enrollment courses, Clubs, Online ANYTIME libraries, or other 'off the shelf' offerings.

Registration and Enrollment

Once you have obtained a signed agreement/contract, the first step in implementing a simple sale is to register the student(s) for the course(s) they purchased. Registration is the request to enroll a student into a course or confirm that the resources are available for them to attend a training event. When your Operations team confirms availability, the registration request will become an Enrollment. Once a student is enrolled, the sale is complete and an invoice is created.

Confirmation Calls and E-mails

Prior to the day of training, you or a customer service representative places a confirmation call to confirm the student's attendance in the upcoming class. A confirmation e-mail supplements the confirmation phone call for an added point of contact to the student or decision maker.

Meeting Students

The first time a student attends a training class in your center, you should meet with them in the morning, walk them to their classroom, set expectations for the day of training, and establish a plan to follow-up with them on the results of the class.

Refer to the **Meetings and Tours** section of this manual.

Complex Solutions

Implementation Planning Meeting

You may need to conduct an Implementation Planning meeting for more complex sales that have special requirements.

The goal of this meeting is to introduce key players, assign tasks and responsibilities, address timelines and milestones, review key success criteria and appoint primary points of contact for both New Horizons and the customer to oversee the entire implementation process through completion of the training event.

Key Success Criteria

- Review the customer's definition of success
- Determine what method of reporting is required to determine success for desired outcomes, such as increased productivity, improved employee satisfaction, or decreased costs
- Schedule milestone meetings to ensure continued satisfaction and success over the life of the delivery

Ask for Referrals

Customers will be more likely to refer you to other contacts and departments if you have a proven record of delivering high-quality and effective training programs. They may also be willing to serve as a reference for other accounts, provide a testimonial, or participate in a case study that documents the success of the solution.

Client Internal Marketing Activities and Tools

Supply your customer with various options or tools to assist them in promoting the New Horizons' training solution to their internal employees. This can be part of the larger Implementation Plan or it can be a single self-contained set of activities.

Internal Marketing Plans can include:

- Email campaigns
- Promotion of private events
- Monthly newsletters
- Break-room posters and other collateral
- Electronic social networking vehicles

Chapter 6 Related Selling Activities

Section 6.1 Conducting a Meeting

Section Key Terms

Tour Stop	*A location within your center designed to act as a conversation starter and demonstration of capabilities for New Horizons.*
Feature	*A characteristic of something.*
Advantage	*How a feature could be applied to reap a positive outcome.*
Benefit	*An advantage that can be applied to a requirement that has been specifically stated by the client.*

Your preparation, delivery and follow-up to meetings are crucial to your success in selling. Meetings are pre-scheduled appointments (T in ACTED) over the telephone or in-person. There are three phases to meetings:

1. Meeting Preparation
2. Conducting the meeting
3. Following Up after the meeting

6.1.1 Meeting Preparation

There are several steps to meeting preparation:

- Step 1: Determine the purposes of the meeting
- Step 2: Determine the meeting outcomes/objectives
- Step 3: List the meeting topics
- Step 4: Develop a detailed meeting agenda

Determine the purpose for your meeting and Desired Outcomes

First Time Meeting	•Establish New Horizons' credibility •Verify contact's role in managing training •Gain permission to proceed
Profiling	•Collect person, dept. & company information •Uncover one of the 3Ps
Explore Opportunity	•Identify business impact •Ask pain, consequences, needs questions •Evaluate the Opportunity
Presenting a Solution	•Present solution & value •Respond to objections •Gain agreement to proceed
Implementation	•Identify success metrics •Establish stakeholders & timelines •Schedule milestone meetings

List the Meeting Topics

Once you determine the meeting's desired outcome, you can plan an appropriate roadmap (agenda) to get there. Your agenda will spell out the topics that you would like to cover in your meeting. These topics will vary from company to company, but keep in mind what will be important to your contact (not just what is important to you). Once you have planned your meeting topic, you can list these in a logical order in an agenda. We recommend that you send the agenda to your contact prior to the meeting. This will achieve several things:

- It will show the contact that you are prepared and professional
- It will give them the opportunity to let you know that your agenda is on-target or you have missed some key elements
- It will refresh the meeting in their mind and prepare them to interact with you

Agenda

1. Introductions
2. Customer-Centered Opening
3. Overview of the Customer's Company
4. Top Priorities for the Company
5. Meeting Topic(s)
6. Demonstrating Capability
    a. Overview of New Horizons
7. Next Steps

6.1.2 Conducting the meeting

Now that you have created your plan, it is now time to execute the plan by following these steps. There are three phases to every meeting. The three phases are:

1. Opening
2. Meeting Objective
3. Closing

1) Opening - Customer Centered Opening

Scheduled meetings may occur in-person. If so, greet the contact by thanking them for their time and begin building rapport which will help you establish a personal connection with the prospect. Make sure you ask questions about them - if you are in their office, look for pictures or objects that will give you a clue as to what is important to this person. People tend to like people that make them feel comfortable. You can achieve this by finding commonalities in interests. Another technique requires paying close attention to their mannerisms; do they talk slowly or quickly, are they warm and friendly or are they "strictly business". You can add to their comfort level by mirroring their "Personal" style.

Begin by repeating the objectives for the meeting. Be sure to make the objective something that is of value to your contact. Next, go over the agenda that you created for the meeting. Confirm receptivity by asking questions such as "Is there anything that you would like to add to the agenda?"

2) Meeting Objective

Execute the meeting remembering to manage the conversations using the paths from Selling Framework. Ensure that you are in the correct stage of your Sales Cycle that is appropriate to the stage the buyer is in within their Buying Cycle.

3) Closing – Next Steps

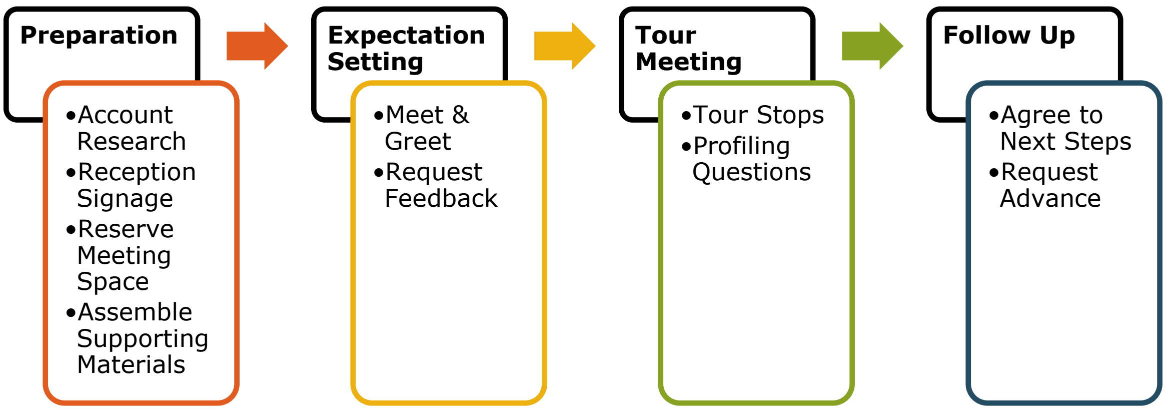
1. Summarize what was discussed
2. Recommend next steps
3. Close the call, close your objective
4. Thank everyone for their time

6.1.3 Conducting a Center Tour

The first time that any Contact visits your center, they must receive a **T**our. The primary objective of any Tour is to uncover a sales opportunity. When mastered, the Tour is a key factor in the New Horizons Sales Process. An effective Tour will help you identify your contact's needs through a conversation conducted while you tour the Center. Make no mistake, the Tour is not a "guided tour" where you show off your "monuments"; but rather is a well-planned sales meeting designed to help drop your contacts defenses and begin positioning you as a trusted advisor. Each Tour is unique and based on the Contacts expressed needs. The "stops" of the Tour will depend on those expressed needs. At each "Tour Stop", you will have an opportunity to express your Centers specific benefits, painting a picture of how you can meet those needs.

Focus on having a conversation, exploring the wants and needs of your contact rather than a solution that you would like to present. Your job is to uncover all of the issues facing your contact and to help them determine the impact that your solution would have on their situation. Asking effective questions and actively listening to a contact's responses will help you accomplish this.

The Tour process includes activities that happen before and after the contact arrives in your center.



Meet & Greet

When a Contact accepts an audit, evaluation or purchases a class for the first time meeting you must:

- Meet with the *Contact* as they check in for their scheduled class,
- Escort the *Contact* to the class*, pointing* out *the* break area*(s)* and restrooms *on the way,*
- *Introduce them to the Instructor (if they are available),*
- *Leave them with the following request, (best* at the Classroom door*, or inside the classroom):*

"*You are here to evaluate the class* (or to 'take your first class" in the case of a first time student) *so, I'd like for you to do two things for me:*

- *Enjoy your time*
- *Evaluate the Instructor's Approach and the Class Dynamics*
  - *How did class respond to the instructor*?
  - *How did class engage with the content*?

You will open your next conversation with the Contact reminding them of this request. Their answers to will help you open a dialogue about your Centers training quality, content, and environment.

- Hand them your business card (and telephone extension) to call if they need anything
- Set a follow-up time to discuss their observations and begin to tour/profile

The feedback from the student assignment helps to open the dialogue about the training quality, content, environment and determines if the prospect envisions himself and/or his staff taking classes at New Horizons.

Making a good first impression means that your physical appearance, mannerisms, and demeanor match the expectations one would have of a sales professional.

Objective of the Tour

The objective of a Tour is to uncover an opportunity. Though for metrics purposes, a Tour can be any scheduled meeting with the client, this section refers to conducting a face to face Tour of your Center. Use the tour to build rapport, to begin conduct a preliminary needs analysis, and tie their needs to the features and advantages of New Horizons. The in-center Tour is designed around specific locations and stopping points, the **Tour Stops**. You tell a story about the feature and advantage significant to each stopping point and its relevance to the center. You will probe for client information by asking a corresponding profiling question to determine the level of business need and its impact.

Your goal is to develop a thorough understanding of your contact's situation so that you can later offer an exact solution to their problems. Corresponding profiling questions to the prospect include asking about:

- Goals
- Problems
- Needs
- Business implications
- Possible solutions

Refer to the section on **Profiling** as a tool for uncovering opportunities.

Closing a sale during or at the end of a Tour is an excellent accomplishment, but this rarely happens. Remember the goal of the Tour is to uncover opportunities. The Meet & Greet and Tour process are designed to help you gather information to advance the sales process.

Preparing for the Tour

Prior to the meeting with your prospective client, the AE will complete the following tasks:

Recall	Set a recall reminder in the CRM and record the Tour in your calendar.
Welcome Signage	Contact the appropriate person to post your contact's company on the Center's sign or digital display.
Reserve a Meeting or Conference Room	Depending on the client, you may reserve a conference room,. Often times finishing a Tour in a break-room or your student lab may be a better option for some clients. Just remember to find a place that is quiet and relatively uninterrupted.

Prepare Client Materials such as:

- Learning Catalog
- Supporting documentation or articles
- Sample Club Membership Card
- Appropriate agreements
- Course outlines

Scheduling Tours in Your Center

The ideal time to conduct an in-center Tour is when they have had time to see a portion of a class. Options for Tour times include:

- Before Class (though not optimal)
- First break in class
- During the latter half of lunch
- During the second break
- At the conclusion of the class
- Or just as a scheduled appointment/meeting

If you are conducting a Tour during a break, make certain that your student is able to return to class before it resumes. By keeping your Contact from class, you run the risk of devaluing the class for your Contact and interrupting the other students.

Conducting the Tour

Tours that sound "natural" and not "rehearsed" are more successful. Relax! Your delivery will be sincere because you are focusing on your contact's needs and expectations. You will focus their Tour on their expressed needs or interests. Walking around your Center permits you to have a conversation in a less formal manner, allowing the client to feel more at ease, as you begin Profiling to uncover opportunities.

Our customers are unique; therefore, no two Tours need be exactly alike. Remember, Tour Stops must hold value to your contact, do not stop to observe the "monument". Rather, focus your discussion, (and the Tour should be a discussion!), on your customers needs them steer them towards the Tour Stops that best illustrates the advantages of New Horizons.

Within your center are logical Tour Stops. Select 3-5 planned tour stops based on what you currently know about the contact and sketch out the questions that you plan to ask. Use the Features from any tour stop as a conversation starter. Explain how that Feature is a New Horizons Advantage, then transition into open-ended Benefit questions.

See the example Tour Script below and notice how the AE transitions from a Feature to an Advantage to a Client Benefit question.

Tour Stops

Features	Advantages	Benefit Questions
Lobby & Registration		
• Central • Spacious • Convenient • Relaxing	• Convenient efficient registration Process • Class reminder and confirmation process • Informational Hub for customer service assistance, course listings, course scheduling, event announcements	• Is the center's location convenient enough for your company's average employee commute? • Do you anticipate your staff requiring any additional services or information when they check in? • Will management require attendance and /or class completion information?
Welcome Board		
• Centrally Located • Electronic or static • Up to Date	• Displays marketing events on latest vendor updates • Highlights public relations and community events • Student recognition • Client listing of all businesses training	• Each day we provide a "fact in history" question. Answer the question correctly, and you are entered into a drawing for a free applications class of your choice. Sound like fun?
Vendor Authorization Wall		

• Display of Center's Authorized Partner Plaques for Hardware, Software, etc.	• Largest Authorized Microsoft & Cisco Learning Partner
	• Vendor & Partner Authorized Training:
	  ◦ Recognized
	  ◦ Reliable
	  ◦ Reputable
	  ◦ Trusted
	  ◦ Guarantee
	  ◦ Quality
		• How important is Certification to you, your department, or company?
		• What operating system, applications, and networking technologies do you use?
		• Which systems, projects or performance issues are getting most of IT's attention?

Conference Room		
• Spacious • Private • Business environment	• Can be converted into a small private classroom and meeting room	• Does your company require specialized training events conducted for high profile staff projects or high-level management?
Wall Map		
• International • Over 300 Centers • More than 60 Countries	• Largest Global Footprint • Can accommodate multiple client locations throughout the world • Center Parity • Content Parity • Instructional Parity	• Will you require training in any of your other locations? • What is your process to ensure your remote workers are trained or have access to training? • What are your company's growth goals? • Are there any plans for expansion?

Features	Advantages	Benefit Questions
Instructor Wall		
• Listing of instructor certifications and authorizations • Instructors maintain an evaluation average of 9.2 on a 10 point scale	• Current Industry Knowledge • Current Vendor Certification • New Horizons Train the Trainer program ensures instructional parity • Cross platform trainers • Career trainers • Instructor evaluation scores consistently exceed industry benchmarks • Instruction is conducted to Adult Learning Principles	• Did you know that your employees can directly impact the quality of their classroom training? • In addition to a lecture format, what other type of learning activities do prefer as part of your training? • What other operating systems, applications, or networking devices are you using in your department?
Mentored Learning Classroom		
• Center Location • Self Paced Training • Simulated Lab environment • Instructor in the Room • State of the Art equipment	• Patent Pending Training Delivery Process • Blends both Instructional Training with Technology Training • Focused Learning • One-on-one mentoring • Flexible scheduling • Customized Program • Private Workstation	• Is scheduling training around your work schedule going to be an issue for you? • In your role, how much time can you spend away from the office to attend training? • Do you learn more effectively in a social or self-directed environment?
Certification Testing Room		
• Located in the Training Center • Provides testing for major software and hardware training provided in this location	• Convenient & turnkey - • Community Study Groups originate from the training class • Instructor availability • Availability of pre- and post assessment prep and learning resources	• Do you know of any other Training Company that will offer a test past guarantee? • Would you consider yourself a power user? • What type of certifications would help you reach your current or future goals? • Do you intend to specialize in a particular area, such as security? • As an IT manager, how important is certification for your staff?
Wall Posters & Testimonials		
• Colorful • Entertaining • Relevant • Informative • Success Stories • Center and Corporate History	• Information reflects the latest Training available in Vendor Technologies • Timeline Poster reflects decades of Training Experience covering all business segments and needs • Training successes solving both business, professional, and personal goals	• Would you be interested in talking personally with one of our clients to validate their training success with us? • What are your company's goals and growth plans?

Features	Advantages	Benefit Questions
Traditional Classroom		
• Ergonomic chairs • State of the art Technology & Equipment • Large Monitors • Computer tables • Internet access / wireless • Modern & clean • Digital Screen for OLL training	• Desk/Computer Tables provide a spacious workspace • Room is designed to easily view Instructional demonstrations • Designed for remote access • Accommodates any level of Vendor Specification • Quality audio delivery system	• Are you interested in networking with staff from other businesses to see how they are handling their security issues? • Do you learn more effectively in a social or self-directed environment?
Server Room		
• State of the art servers	• We utilize the standards and practices taught in our training programs to manage our own network and support a stable classroom environment	• How many servers, end-users, and IT professionals are in your company? • What server operating systems, applications, and versions are you using? Are you planning any upgrades? • Do you manage your servers or do you outsource server management to a data warehouse or managed services company?
Employee Recognition Wall		
• Plaques and photos of center employee of the Month/Year	• Public recognition helps attract, motivate, and retain quality staff and promotes customer service	• What are some of the ways you reward your employees? • Is training part of your employee recognition program? • Do your employee professional development plans include training and skill development?
• **Break Room / Community Room**		
• Coffee & refreshments • Couch and chairs • Office Center with internet access • Refrigerator • Vending machines • Microwave • Afternoon cookies	• Don't have to leave the facility for lunch or dinner • Bring your own food • Opportunity to relax and unwind • Opportunity to socialize network with peers	• How often do you get the chance to casually discuss or compare notes with other companies /staff on common business issues?

Handling Interruptions Appropriately

Interruptions can occur while you are touring a Contact. That is OK, and part of the socialization for the Contact. You want to show them that New Horizons is a dynamic place to work… and learn!

Maintain control of the situation by summarizing the key points from your notes and then continue the Tour.

Sample Tour Scenario

The client is the Director of Marketing for ABC Company and is evaluating Excel Level 1 / MS Office Suite 2007. The AE meets the client (DM) outside of the Excel classroom, during afternoon break.

AE conducted a Meet and Greet with the client upon his arrival in the AM.

AE	*Thank you for taking a few minutes to let me show you our center and get a better understanding of what your needs are. As we walk, would you mind giving me your thoughts on your training thus far and if it is meeting your expectations?*
Client	*Actually, it is going very well. I really like the instructor's style of presentation. Quite interactive with everyone in the classroom and he is very entertaining. The class is fun. I've already learned a couple of new things and I thought I was already pretty good at using Excel.*
AE	*Is it something that you can incorporate immediately when you get back into the office tomorrow?*
Client	*Absolutely, it will be quite a time saver for me.*
AE	*Oh, how so?*
Client	*Well, I found out that you can import an image such as a logo and that will help me keep my logo in front of my clients when I forward them my spreadsheets.*
Cue to begin moving toward the **Instructor Wall**	
AE	*Importing images only one of the important items that you will learn, trust me. Let me show you something that reflects in more detail what you are experiencing in your classroom and why.*
INSTRUCTOR WALL	
AE	*This is our Instructor Wall. This wall is more than just a display case for certifications. What it really depicts is a level of quality and expertise that all New Horizons Instructor's <u>must</u> attain as part of their career path. For example, your Excel class follows the standards set by our designated training partner, in this case Microsoft, but your instructor also happens to be one of the top Microsoft Certified Application Specialist Instructors we have. Also, Mary has been with us for 5 years.*
Pointing to Mary's certificate	
AE	*Here is Mary's certification designating her as a training specialist for not only Excel, but Word, PowerPoint, Access, and Outlook. Many of our instructors have expertise with teaching workers business skills like effective business communications, customer service, and managerial leadership, which are becoming more and more important in today's workplace. As a Marketing Director, you may recognize Adobe. Mary is also proficient in Design, Media and Graphics applications. Are any Adobe applications being used by your staff?*
Client	*Actually, I have one person, Denise, who uses a variety of Adobe software in her job.*

AE makes a note to **profile further** into Denise's job responsibilities and the department's software proficiency level	
AE	*You mentioned in our initial call that you were not happy with the quality of training from prior training experiences. Did you know that our students directly impact the quality level of our instruction?*
Client	*How do they do that?*
AE	*For example, at the end of every class, students complete an online evaluation assessing the training experience. Our instructors maintain an average of 9.2 out of 10, which is dramatically higher than the competition.* *I mentioned our partnerships with Microsoft and Adobe, let me show you some of our additional partners that support our training programs.*
Cue to begin moving toward the **Vendor Authorization Wall**	
AE	*Presently, you are using Microsoft SharePoint Server 2007. Is that correct?*
Client	*Yes.*
AE	*How long have you been on it?*
Client	*It is going on 3 years now.*
AE	*Are there any plans for upgrading to SharePoint Server 2010?*
Client	*Maybe in 2011.*
AE makes a note to **profile** into SharePoint roles within the IT department and business units	
AE	*Are there other server technologies or network technologies that your company uses to support and secure your network?*
Client	*Yes, actually. Security is a high priority for us at the moment and Cisco is key component to our network. Marketing is adding a complete e-commerce update to the company website and security will be a big factor.*
AE makes a note to **profile further** into the e-commerce initiative	
Vendor Authorization Wall	
AE	*If you notice both our Microsoft's CPLS (Certified Partner Learning Solutions) and our Cisco authorization are represented here. In fact, Cisco recently named us their Learning Partner of the Year.* *By the way, here is the plaque designating us as an authorized Adobe training provider. In total, we are associated with more than 30 hardware and software manufacturers and courseware publishers, including the vendor neutral Association CompTIA.* *In order for us to maintain these authorizations, each vendor re-validates our training quality and delivery on regular basis and guarantees our standard of excellence.* Hold up Learning Guide *Do you recall the Learning Guide given to you this morning at the start of the class? This courseware is what I like to call the 'just in time reinforcement' tool. Have you ever left a training session and you couldn't remember the next day how to do something that was demonstrated?*

Client	*Shaking his head up and down*
AE	*I certainly have as well. The courseware along with access to post class resources that include an eLearning course for most of our courses and a more detailed pdf manual are available to you for 6 months following each class.* *If you recall, we had a bit of difficulty finding just the right time for you to come in for your evaluation class. Would you agree that scheduling would present challenges, especially coordinating training for entire departments?*
Client	*That goes without saying! Adding multiple locations into the mix makes it even more of a problem.*
AE	*Is your department tasked with making these arrangements for all of your locations?*
Client	*We sure are!*
AE	*In light of what you just said about scheduling issues and also the fact that you may be upgrading to SharePoint Server 2010, let me show you something?*

Cue to begin moving toward the **Mentored Learning Classroom**

Client	*I noticed this room when I took my break this morning. It's set up differently than my classroom.*
AE	*This is our Mentored Learning Classroom.* *We just finished designing and rolling out a companywide training program for XYZ Company who upgraded to Windows 7. They are just about the same size as ABC Company and, while they don't have multiple locations, they do have scheduling issues.* *After some initial discussions with them, we determined their end-users were going to require a high degree of flexibility in their training schedules. Also, they had a wide range of skill sets; from basic to proficient, with a few power users.* *Their IT staff, that had to support the upgrade, needed a targeted approach to training. They only needed to focus on what they didn't know about the new PC Operating System and didn't really want to spend time on things they knew well or had experienced before. Mentored Learning successfully addressed all of these needs for all user groups. We simply customized each student's learning experience.*

Have the client step into the room and begin to point out the following:

AE	*Each student has his own unique training schedule, personal workstation, and training program that blends the best of instructor led training with technology training tools. Notice how our Mentor, Bill, works with that individual student over there. As with all our Mentored Learning students, Bill sets up her schedule and develops a personal learning plan to meet her needs or that of her manager. By the way, Bill is fully certified on the course material she is taking. If she has any questions, needs one-on-one training on any point in the course, he is right there for her... And, he is does that for everyone in the room.* *Putting this in context for your company, could Mentored Learning help address any scheduling issues that occur with the specific staff members you might be thinking of?*

Client	*Clearly.*
AE	*Can you see how Mentored Learning can address a wide range of skill sets from your people?*
Client	*That is a point that I hadn't actually thought about before, but it makes sense.*
AE	*Let's arrange for a time to demonstrate the Mentored Learning program to either you or another department member. We can talk about that following your class. Sound good?*
Client	*Yes... let's talk further.*
AE	*Meanwhile I think it is time to get you back to class. I'll see you at 4:30 PM and we can pick up where we left off. I'll meet you here.*

Another Sample Stop – World Map

World Map	
AE	*You confirmed in our initial phone conversation that ABC Company has 3 regional offices located in State of Washington, Illinois, and North Carolina with approximately 250 employees.* *How many employees are in each of these locations?*
Client	*I estimate of the 250 total that:* *100 are in Washington* *70 are in Illinois* *80 are in North Carolina*
AE	*Would you know what percentage of all these employees are remote workers... not actually working in one of these offices?*
Client	*I'd say at least 25% of the sales staff are working remotely.*
AE	*New Horizons has over 300 locations in 60 countries worldwide. It is more than likely there is a NH center close enough for any remote worker in your company to take advantage of a training requirement associated with their development plan.* *What are your company's growth goals and plans for expansion?*

AE makes a note to **profile further** the technologies used to support the remote users

Another Sample Stop – Server Room

Server Room	
AE	*This is our server room. We utilize the standards and practices taught in our training programs to manage our own network and support a stable classroom environment. How many servers, end-users, and IT professionals are in your company?*
Client	*We have about 12 servers, 250 end-users, and 6 IT professionals.*
AE	*What server technologies do you use?*
Client	*I'm not sure, but our IT manager, Howard Stone, would know.*
AE makes a note to contact and **profile** the IT manager	
AE	*Do you host your own website?*
Client	*Yes.*
AE	*Who does your web development?*
Client	*My digital design team manages all of our web presence, website design, and search engine optimization.*
AE makes a note to **profile further** into the technologies and staff proficiency	

Section 6.2 Writing Records

One of your daily tasks will include maintaining your Customer Relationship Management ("CRM") records. CRM records are the foundation of the center's business and every other sales report and measuring tool.

Proper CRM Records can:

- Validate you are working with your accounts, i.e. penetrating for new opportunities and/or ensuring existing opportunities are valid
- Demonstrate an understanding of your customers' business needs, objectives, and goals, plus validate you are offering the right solutions and managing accounts in the 'proper' manner
- Provides your Sales Manager with the key information to understand your business opportunities and coach accordingly.

"If it's not in the CRM, it didn't happen." If you fail to note a conversation or action, management considers that it did not occur. This becomes important in account conflicts between you and other Account Executives, or in conflicts regarding Territory Rules of Conduct.

6.2.1 Strategic Information

An essential step to a successful sales strategy is gathering key information. Key information starts with basic profiling and expands to understanding your customers' business. The more accurate the information is, the better you are able to formulate a correct strategy. The array of information must answer the 5WH questions: Who, what, when, where, why and how.

Who	"Who" refers to the name of the account, names of the contacts, and who needs the training
What	"What" refers to the 3P opportunity
Where & How	"Where" refers to the location and delivery of the training based on learning style and course content
When	"When" refers to the timeframe for delivery of the training
Why	"Why" refers to the customers' expectations or results desired

In a typical CRM, you will organize customer information into a few categories:

- Account Information
- Contact Information
- Profile Information
- Opportunity Information

6.2.2 Account Information

This includes information such as:

- Company Name
- Address
- Tier Level
- Company Revenue Potential
- Number of Employees
- Web Address

6.2.3 Contact information

This includes information such as:

- Name
- Title
- Department
- Scope of Responsibility
- Phone Number
- E-mail Address

6.2.4 Profile Information

This captures information such as:

- What the company does
- What industry the company is in
- What the company and training goals and objectives are for the coming year
- What technologies the company uses

6.2.5 Opportunity Information

This describes:

- Potential or converted opportunity
- Opportunity start date
- Opportunity amount
- Estimated close date

Opportunity Selling Stage

The selling stage establishes the activities that should have been completed so far in the opportunity lifecycle, stage transition activities, and the expected close probability range as you complete each stage.

Product Offerings

Identify the product offering related to the opportunity, including:

- Product modality (Mentored Learning, Traditional Instructor Led Training, etc.)
- Product description (course title, certification track, club title, etc.)

6.2.6 Standards for CRM Entry

The clarity and consistency of account information gathered will vary depending on the CRM that your center uses to record information. Some CRM software packages allow you to enter information into detailed categories. Other packages may only allow you to enter notes. Regardless, New Horizons standards for CRM entries must be applied to:

- Record and Account Setup
- Client Profiling Information
- Opportunity Management
- Call Planning/Call Scheduling

Notes Entries must include:

Purpose of the call	The purpose of the call was to discuss Jim's department software deployment.
What was discussed	Jim discussed how his first need would be in Microsoft SQL training, and then Microsoft Access training for his end users. He has a meeting scheduled tomorrow to discuss budget and personnel.
Purpose of the next call	On our next call, Jim and I will review the outcome of his meeting and we will discuss options in training and timelines.

Zero Time Rule

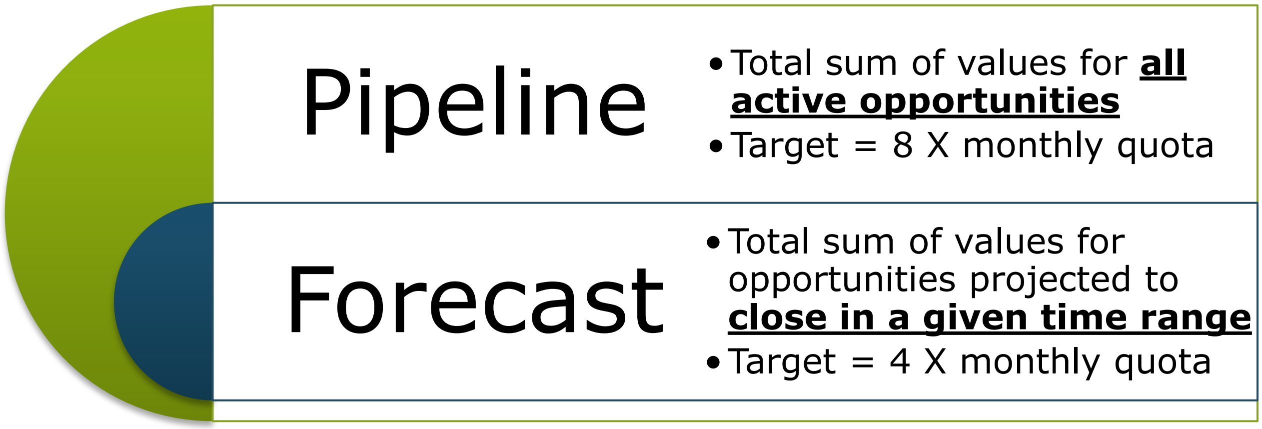
When dealing with accounts governed by the "Zero Time Rule", an Account Executive has *zero time* to penetrate an account. The account must be worked in a timely fashion according to the Sales System. This holds true for inherited accounts, inactive accounts, and accounts won from conflict.

The data base record needs to reflect specific actions that include but are not limited to:

- Recalling inherited or inactive accounts – confirm Decision Maker
- Reviewing the account and confirm existing data within the record using the 8Qs (foundational company questions):
    1) How many employees in your company?
    2) How many offices or locations does your company have?
    3) What are your company's growth plans for the next 18-24 months?
    4) How does technology fit into those plans?
    5) What are the most important things IT needs to focus on to support the company business plans?
    6) What are the company's greatest challenges?
    7) What applications are in use?
    8) Does your company set aside budget for employee development?
- Asking questions about the customer's present day business issues and needs
- Verifying any current enrollments and outstanding training

Section 6.3 Pipeline Management and Forecasting

Opportunities entered into your CRM determine the contents of two projection reports:



The Pipeline represents the total value and number of all existing open Opportunities actively being developed by an individual or a center within a given timeframe, typically in 30, 60, and 90 day increments.

6.3.1 Pipeline Management

Pipeline Management helps you and your Sales Manager evaluate your effectiveness in advancing opportunities through the sales process and find areas where sales stall or fall out of the Pipeline.

The goal of Pipeline Management and Forecasting is to:

- Build predictable business for you and your center
- Know what sales opportunities you are developing each month
- Build diversification
- Target key areas for growth
- Strategize how to apply sales promotions or special offers

A company enters the Pipeline as a prospect and exits the pipeline as a customer or a lost sale. At each stage of the process, you must enter the data to create a realistic view of the potential revenue and closing dates.

Be careful to:

- Assign the right sales stage
- Assign the right amount to the opportunity
- Assign a realistic estimated close date
- Remove opportunities from the sales Pipeline that have been lost or delayed

A healthy Pipeline will:

- ☑ Be 8 times your monthly sales goal
- ☑ Include new opportunities added regularly
- ☑ Display multiple opportunities advancing through the Selling Framework in a timely manner

The information that is contained within the sales Pipeline will provide you valuable information about how effective you are in each step of the Sales Cycle.

6.3.2 Forecasting

A Forecast is the projected number and value of sales to be closed for the current month. This amount is generated by analyzing Opportunities currently in the Sales Pipeline.

You will manage opportunities from your forecast daily. You and your Sales Manager will go through your opportunities at the beginning of each week to update and strategize on how to improve each opportunity's close ratio. Remember that the total sum of your monthly forecast opportunities must be a minimum of 4 Xs times your monthly quota.

6.3.3 Collection Calls

It is your responsibility to identify accounting payment procedures when the contract is signed. Follow up with the client to ensure payment is made on the agreed-upon date. If you do not receive payment, immediately call your contact in their Accounting Department. The following procedures will guide you through the collections process.

- Call immediately after the sale
- Call the day after payment was expected
- Call one week after non-payment

Section 6.4 Territorial Rules of Conduct

Section Key Terms

TROC	*The common term used to define this process internally.*
Account	*An account is a company name, linked to a distinct address within a territory.*
Decision Maker	*Each account has at least one employee who has the authority to purchase computer training. This person is the client's Decision Maker. There can be multiple Decision Makers within an account.*
Delivery Center	*The center that delivers the training is the delivery center. Generally, this center owns the territory in which delivery will take place.*
Existing Center/New Center	*A new center is considered the same as an existing center once the Owner has hired an Account Executive and notified the network via a posting on the New Horizons Net (Extranet).*
Local Center	*The New Horizons Center that has the primary office of the Decision Maker for the opportunity within its territory is the local center.*
Open Territory	*An open territory is any geographic area which has not been assigned to a New Horizons franchise or which has been assigned to a franchise but the Owner has not yet hired Account Executives and notified the network via a posting on the New Horizons Net (Extranet) that he has begun selling.*
Opportunity	*An opportunity is a potential sale or group of training events being purchased by a known Decision Maker. It is not a pricing agreement; pricing agreements do not necessarily imply a commitment to purchase a specific amount of training. There may be many opportunities within a single company; for example, a company may have three specific opportunities:* • *One division in South Dakota may be training employees on NT Manager for five locations in the Midwest.* • *A manufacturing facility in Ohio may be training all support staff in Excel in three cities.* • *The same facility in Ohio may be training all outside sales reps in ten cities on PowerPoint.* *These examples represent three different opportunities, and may have one, two, three or more different Decision Makers.* *An opportunity may also exist in which an organization has a local office in one territory and an identified Decision Maker in another territory, even if a specific training need is not known. For example, you may place a cold call to a company in your territory and be told that the Decision Maker for training is in another territory. If you are able to obtain the name of this Decision Maker, you may then follow the steps for notifying the local center and contact the Decision Maker whose name was given.* *Account Executives who have sold training to a particular company's local office are encouraged to expand the scope of training beyond their own territory as long as the Territorial Rules of Conduct are followed.*
Originating Center	*The New Horizons Center that first discovers the opportunity is the originating center, as indicated in the earliest notes in the CRM. When a Decision Maker is located in another center's territory, the originating center cannot be determined until the local center has been called regarding the opportunity. If the call reveals that the local center is already working the opportunity, then the local center is considered the*

	originating center.
Territory	*A territory is the geographic area assigned to the New Horizons Center in its New Horizons' franchise agreement. In the case of a company-owned center, the territory is a zip-code defined geographic area defined by New Horizons' Corporate.*

When strictly enforced and adhered to by all centers, these Territorial Rules of Conduct promote a healthy and professional sales environment for New Horizons to maximize opportunities.

Remember the first and most critical element of Inter-franchise relations: all parties must do whatever is in the best interest of the client.

6.4.1 Your Responsibilities

Check the appropriate list or database before contacting any client or pursuing an opportunity resulting from inbound calls that come from outside of your territory. The New Horizons' public website is the official site to validate "location" (zip codes, international territory or country codes) for your leads.

6.4.2 Owning an Opportunity

The following are the rules for owning an opportunity. An inter-franchise business is opportunity-based and not account-based--these rules address pursuing opportunities within other territories.

Rules for Owning an Opportunity

An originating center may pursue any and all opportunities with Decision Makers who are in their territory regardless of whether that center is a delivery center.

An originating center may pursue an opportunity in which the Decision Maker is in the territory of another New Horizons center only if:

A. At least some portion of the opportunity involves training to be delivered in the originating center's territory, or
B. All of the training opportunity will be delivered in one or more open territories, or
C. A company which has staff in the originating center's territory indicates that training decisions are made elsewhere, either in addition to or instead of locally, and the Account Executive obtains the name of the individual believed to be the Decision Maker.
D. If neither a, b, nor c is true, the center must refer the opportunity to the local center.

You may never pursue an opportunity where both the Decision Maker and all of the training are located in another franchisee's territory or territories. That opportunity must be referred to that local center. The company in question must have local staff situated in your territory AND you must have the name of a particular individual that is believed to be the Decision Maker. For example, an Account Executive may not randomly call a list of Fortune 500 companies outside his territory for the purpose of selling training.

Any opportunity that involves two or more delivery centers that meets the minimum amount established by the Corporate Education Solutions Program in client billings should be referred to the Corporate Education Solutions Department.

Examples of Rules for Owning an Opportunity

The following examples will illustrate the above rules. These examples assume the rules for contacting clients outside one's territory, as outlined in this document, have been properly followed.

1) The local center is the originating center.
    - This center owns the opportunity no matter where the delivery locations are.
2) All delivery is in an open territory or the originating center's territory.
    - The originating center owns the opportunity regardless of where the Decision Maker is.
3) A center that is not the local center or the delivery center discovers an opportunity.
    - The opportunity must be referred to the local center regardless of whether that center is a delivery center. The local center owns this opportunity unless ownership has already been vested with another center as per these rules.
4) The originating center will be a delivery center but the Decision Maker is in another territory.
    - The originating center own the opportunity.
5) The Decision Maker is in an open territory.
    - The originating center owns the opportunity.

6.4.3 Coordination Between Centers

It is essential that the originating center and local center communicate with each other to confirm who owns the opportunity before there is further contact with the Decision Maker.

The steps below illustrate the procedures you must follow before pursuing opportunities with Decision Makers outside of your territory. This assumes that you are the Account Executive who discovers the opportunity. (the originating center Account Executive).

Step 1

You discover an opportunity and the Decision Maker is located outside of your territory. You must clearly identify who that Decision Maker is.

Step 2

Before calling the Decision Maker, notify your Sales Manager of the opportunity and wait for notification that the proper contact has been made with the local center. Or, if the initial contact was from an in-bound call, make no further contact with the Decision Maker until proper communication has taken place.

Step 3

Your Sales Manager must contact, via phone, the local center to make a courtesy notification call. This is a Sales Manager to Sales Manager call. The purpose of this call is not to request permission to contact the Decision Maker. The purpose is to notify the other center that you have discovered an opportunity. In this way, the Sales Mangers can determine who owns the opportunity and, in the event the local center has an existing relationship with the customer or Decision Maker, you may approach them in a coordinated and professional manner.

No contact with the Decision Maker should take place before this step is satisfactorily concluded. A confirming e-mail must be sent by the originating center to document the contact.

If the phone call is not returned, your Sales Manager is to immediately send an e-mail with a copy to the local center's General Manager to document the attempted contact and request a return call immediately.

In order to best serve the needs of the customer, your center should be given all available information concerning the customer's purchasing habits, procedures and trends, as well as any special requirements if known, before contacting the Decision Maker. Accordingly, the local center should reveal to your center such customer information. Upon request of either center, both centers shall be required to fax CRM notes related to such an opportunity.10 This process reduces potential confusion and improves the chances of closing the opportunity rather than losing it to the competition.

[10] *Centers are not obliged to provide pricing information as this may be viewed as an anti-trust violation.*

It is important that nothing be conveyed to the Decision Maker that would cause him or her to infer that there has been any dispute between centers. There must be no attempt to undermine a center's legitimate pursuit of an opportunity.

Step 4

All contacts and attempted contacts between the originating and local centers must be accurately reflected in the appropriate CRM with copies of e-mail and fax correspondence maintained for reference in the event of dispute. The absence of complete documentation may disqualify your right to pursue the opportunity.

Step 5

The local center's Sales Manager is responsible for calling back the originating center's Sales Manager within one business day. If no response is received within one business day, the process is escalated to the General Managers. If the local center's General Manager does not respond within one business day, you may proceed with the opportunity. An e-mail to confirm this must be sent.

The following table represents a summary of the procedures outlined above, where the originating center Account Executive discovers an opportunity in the territory of the local center, and a relationship with the customer already exists with the local center.

30 DAY PER	Action	Rationale
	Local center Account Executive cannot contact the client regarding the specific opportunity for 30 days.	Gives time for the originating center Account Executive to close the business.
	Local center Account Executive provides all available client information to originating center Account Executive.	Ensures that the originating center Account Executive understands client needs, history and preferences.
	Originating center Account Executive sends copies of CRM notes by e-mail to local center Account Executive as requested, but not more than once per week.	Gives local center a record of the originating center's transactions and the progress of the sale, without placing an undue burden on the Account Executive.

I O D	If originating center cannot complete the transaction within 30 days, originating center Account Executive must either discontinue working on the opportunity or call local center for a mutually agreeable extension.	It is desirable that the originating center completes the transaction or discontinues contact and allows the local center Account Executive a chance to win the business.
	Should the originating center Account Executive fail to notify the local center Account Executive within the 30 days, the local center Account Executive is free to pursue the opportunity.	Communication is a must between the two Account Executives. The Originating Account Executive must move the opportunity to close or dump.
	Any additional business discovered by the originating center is treated as a new opportunity and the process starts again.	Account is penetrated with proper ownership determination.

Section 6.5 Recurring Activities

Daily	Monthly	Quarterly	Annually
• Prospecting • Recalls • ACTED Appointments • Sales Related Meetings • Coaching Meetings	• Pipeline Review • Qualifying Questionnaire • Forecasting • Internal Meetings	• Account Planning • Daily Sales Outstanding (DSO) Review • Internal Training	• Portfolio Review • Account Strategy • Performance Review

Chapter 7 Professional Development

Section 7.1 Training

You are required to continually acquire product and industry knowledge, as well as update your selling skill set. You will have a combination of center and Corporate-sponsored training events and activities available to you. New Horizons University offers you a wide array of professional sales and technology development courses. These can be viewed and scheduled in the NHU Learning Management System.

New Horizons Vendor partners also offer events to improve knowledge of their products. Search their websites for further information, or ask your manager or NHU personnel.

Section 7.2 Resources

As an Account Executive, you are responsible for managing many activities--large quantities of data and multiple relationships within each of your accounts. The job can seem overwhelming at times. However, we have developed many tools and training that will help you manage your career successfully. You can find a sample list of these tools on the next page.

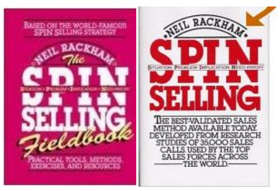
Prospect	Qualify	Explore Needs	Build & Present Solutions	Commitment & Close	Won & Implement
aeWizard					
• *Weekly Prospecting Planner* • *Call Planner* • *The New Horizons Script Book* • *Business Development Script* • *Interest Creating Letter* • *Knowing Your Buyer* • *New Horizons Value Propositions* • *Webinar Tools* • *The Selling Framework Poster*	• *SMB Capabilities Presentation* • *Mentored Learning Video* • *Call Planner* • *Qualification Questionnaire* • *Sponsor Letter* • *Value Statement Creation Tools* • *Pain Sheet* • *Collateral Meeting Planning* • *NH Sales Technology Grid* • *Profiling Scripts* • *Opportunity Assessment Tool*	• *Call Planner* • *Solution Planner* • *Pain Sheets* • *Case Studies* • *Collateral* • *Customer Assessment* • *NH Sales Technology Grid* • *Active Listening* • *Meeting Planning*	• *Solution Planner* • *Implementation Plan* • *Proposal Templates* • *Case Studies* • *Product Tools* • *Pricing Template* • *Meeting Planning*	• *Proposal Template* • *Implementation Planning Tool* • *Objection Handling* • *Closing Techniques* • *Negotiating Guidelines and Styles* • *Case Studies* • *Order Agreement* • *Meeting Planning*	• *Implementation Plan* • *Implementation Planning Tools* • *Customer Expectations check list* • *Implementation Communications Strategy*

Source Locations:

1. *http://nhu.newhorizons.com*
2. *http://NHULMS.newhorizons.com*
3. *http://network.newhorizons.com*
4. *http://www.newhorizons.com*

Section 7.3 Recommended Reading

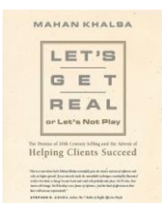
Publications outside of New Horizons documentation can help you develop your sales skills. From time to time, NHU will publish a list of book titles that can help you better understand your customers, their purchasing habits or improve your ability to retain them as customers. At the time of this publication, the sales trainers from NHU recommend these reads:



7.3.1 Spin Selling

By Neil Rackham

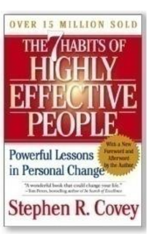
What makes success in major sales? How do some salespeople consistently outsell their competition? Why do techniques like closing work in small sales but fail in larger ones? How can salespeople dramatically increase their sales volume from major accounts? Now you can find answers to all these questions with the SPIN strategy.



7.3.2 Let's Get Real or Let's Not Play

By Mahan Kahlsa

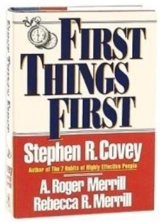
Introducing a fresh approach to effective selling from renowned sales and business development expert Mahan Khalsa and Franklin Covey, world leaders in Learning and Performance Solutions. Let's Get Real is insightful, practical, revealing and focused on developing both the attitude of sales strength. If you're ready to go beyond selling to providing solutions that make a real difference for you and your clients, you're ready for Let's Get Real.



7.3.3 The 7 Habits of Highly Effective People

By Steven R. Covey

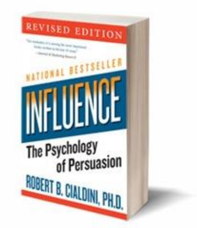
The 7 Habits of Highly Effective People: Powerful Lessons in Personal Change was a groundbreaker when it was first published in 1990, and it continues to be a business bestseller with more than 10 million copies sold. Stephen Covey, an internationally respected leadership authority, realizes that true success encompasses a balance of personal and professional effectiveness, so this book is a manual for performing better in both arenas. His anecdotes are as frequently from family situations as from business challenges.



7.3.4 First Things First

By Steven R. Covey

What are the most important things in your life? Do they get as much care, emphasis, and time as you'd like to give them? Far from the traditional "be-more-efficient" time-management book with shortcut techniques, First Things First shows you how to look at your use of time totally differently. Using this book will help you create balance between your personal and professional responsibilities by putting first things first and acting on them. Covey teaches an organizing process that helps you categorize tasks so you focus on what is important, not merely what is urgent.



7.3.5 Influence: The Psychology of Persuasion

By Robert B. Cialdini

The classic book on persuasion, explains the psychology of why people say "yes"—and how to apply these understandings. Dr. Robert Cialdini is the seminal expert in the rapidly expanding field of influence and persuasion. His thirty-five years of rigorous, evidence-based research along with a three-year program of study on what moves people to change behavior has resulted in this highly acclaimed book.

You'll learn the six universal principles, how to use them to become a skilled persuader—and how to defend yourself against them. Perfect for people in all walks of life, the Principles of Influence will move you toward profound personal change and act as a driving force for your success.

Appendices

Glossary of Common New Horizons Terms

There are basic terms related to your role as a New Horizons Account Executive applied throughout this manual. This Glossary provides a listing and definition of how you use these terms.

New Horizons Specific Terms

Term	Definition
EAM	Enterprise Account Manager
ELS Account	A Company that has an ELS Agreement.
Enterprise Learning Solutions (ELS)	The department responsible for establishing centralized negotiated pricing, registration services, invoicing, and reporting for large national and global enterprises delivered through multiple New Horizons locations.
Initial Sales Manager Training (ISMT)	Training program developed for and delivered to newly hired Sales Managers by NHU.
Initial Sales Training (IST)	New hire sales training program for business-to-business sales people including AEs and EAMs developed by NHU and delivered by local center management, via Virtual Classroom online, or by NHU instructors.
Sales Cycle	All customer facing selling activities in the Prospect, Profile & Qualify , Explore Needs, Build & Present Solution, Commitment & Close, and Implement stages.
Sales Development Program	Ongoing NHU delivered sales skills programs.
Sales Process	The selling system includes all the client-facing actions an AE takes to stimulate interest in their product. This system would start when the AE picks up the phone and ends with follow-up activities that would lead to further spending from a company that has already purchased.
Selling Framework	A matrix designed to assist the Account Executive in managing sales opportunities in a logical sequence of steps that aligns the seller with the buyer.
Selling System	All of the actions performed at a New Horizons center related to sales, from organizing a sales floor to generating sales.

General Account Executive Terms

Term	Definition
Account	A company within the New Horizons Territory that has either purchased from New Horizons in the past 9 months or "ACTED".
Active Account	Synonymous with 'Account'
B2B Student	Person attending New Horizons courses that are purchased by their employer.
Business Client	Synonymous with 'Client Employee'

Client Employee	An employee of an Account
COL	Corporate Owned Location, franchisor owned training center.
Company	A business, association, organization, or group of persons with the ability to purchase goods and services; that is or could become an Account.
Contact	The name of an employee at a Company.
Decision Maker	Person who makes buying decisions within a Company.
Economic Decision Maker	Person who approves the payment of services, they may or may not be the Decision Maker.
Enterprise Account	An organization within a center's territory with greater than 100 employees not currently covered by an ELS agreement.
Franchise Location	Individually owned and operated New Horizons training center.
Inactive Account	An ex-customer of New Horizons who has not ACTED or purchased in the past 9 months.
Knowledge Worker	Opportunity influencer (customer), likely to be a student who might take a class at New Horizons.
Non-Strategic Prospect	All Prospects that are not Strategic.
Sales Management Process	Structured process for managing sales employees' sales activities, sales opportunities, pipeline management, and portfolio management.
Stale Account	Synonymous with Inactive Account
Strategic Prospect	A Prospect that has been identified as being either one of the top 100 companies or in the top 10% of companies in a centers Territory.

Sales Activity Terms

Term	Definition
Account Management Process	Structured process for managing an Account.
Account Penetration	Process for identifying new Opportunities within an existing Account.
Account Strategy	A plan used to obtain specific information, determine goals and maximize Account Penetration.
ACTED	Actions that move a Prospect to an Account - Audit (Mentored Learning or Instructor Led Training) - Course (Purchase or Evaluate) - Tour (Any Meeting) - Event (a Seminar, Workshop, Open House, etc.) - Demo (OLL, OLA, Measure-Up, Learning Port)
Advance	The completion of a measurable outcome that moves an Opportunity from one stage in the Sales Process to the next.
Advantage	Any characteristic of a product or service that might serve a buyer.
Benefit	A feature, product or service that meets a buyer's expressed need.

Cold Call	Outbound telephone call to a Prospect that is not a Warm Call with a goal to uncover Potential Opportunities and generate interest in our offerings. The ultimate goal of the call is get a prospect to ACTED.
Collections Call	A phone call to a company that has purchased training but has not submitted the payment due.
Consultative Sale	An Opportunity that involves understanding customer issues, problems and asking questions that can help foresee challenges that the buyer may encounter.
Continuation	An outcome from a sales call that does not Advance the Opportunity in the Sales Process.
Customer Acquisition Strategy	A defined process for converting Prospects into Accounts including marketing, prospecting, and sales activities.
Feature	Features are neutral facts, data, information, or characteristics of products and services.
Lead	Contact information for a Prospect.
Lead List	A list of potential Prospects used for making Cold Calls. Includes company name, address and phone number at a minimum.
Margin	The difference between the invoiced amount and the cost to deliver a class. Calculations differs by Center.
Market	A specified category of potential buyers (Example: Technology, Healthcare, Manufacturing, etc.)
Opportunity	An Account need where the following information has been defined: - Explicit Need - New Horizons Solution - Timeline to implementation - Decision Maker - Budget / Cost
Polling	Outbound phone call to find Prospects who are in the Evaluating Options stage of the Buyer Process.
Portfolio Management	The act of prioritizing and developing an assigned list of existing and potential Accounts.
Potential Opportunity	An Account that agrees to ACTED or has identified a potential problem that New Horizons may be able to solve. Remain in the Prospect stage in the Sales Process, once Qualified they become Opportunities.
Profiling	The purpose of Profiling is to uncover opportunities that might require training. It is accomplished by asking questions in a conversational tone, the answers to which provide background information about the company, department, person, and past training experience of a Company. You use the information gathered uncover new contacts and Potential Opportunities.
Prospect	A company or decision maker that is not an Active Account.
Prospecting	Process for stimulating interest or creating demand for your products and services.
Prospecting Call	A phone call to a Company or new Contact with the purpose of uncovering Opportunities and generating interest in our offerings.
Recall	A scheduled follow-up, usually a phone call, to an Account or Contact.

Retention Strategy	A plan to keep existing Accounts, content and loyalty .
Sales	Influence or induce someone to make a purchase who might otherwise not buy or buy from the competition.
Sales Component	One piece of the overall Selling System.
Solution Sale	A refined Transactional Sale where the Seller creates value by understanding the impact of the training solution on the Buyer's business; can help to build a Consultative Selling relationship.
Transactional Sale	An Opportunity that enters the Pipeline when a customer is in the Evaluating Options stage of the Buyer Process. These customers are considered 'imminent buyers' as they have already recognized a need that they are ready to resolve.
Warm Call	A call made to: - a contact that has expressed interest in a New Horizons offering - a new contact within a company that is a current customer - a contact referred by a current customer
Warm Lead	Contact information used to make a Warm Call.
Zero Time Rule	An Account Executive has zero time to penetrate an account. The account must be worked in a timely fashion according to the Sales System. This holds true for inherited accounts as well as accounts won from conflict.

Administrative Terms

Term	Definition
ARCE	Average Revenue per Client Employee
CMS	Center Management System - The CRM system recommended by New Horizons Corporate that groups gathered data into accessible information to be used for specific purposes such as Customer Relationship Management, Course Scheduling, Resource Management, etc.
Customer Relationship Management	The database used to manage client interactions (CRM).
Database	The software system that collects information that is organized so that it can easily be accessed, managed, and updated.
Database Management	The management, execution, and documentation of customer management activities dictated by the Sales System.
Database Record	Synonymous with 'Record'
Forecast	The projected number and value of sales to be closed for the current month or within a defined time range. This amount is generated by analyzing Opportunities currently in the Sales Pipeline.
Funnel	A Funnel is a graphical representation of what happens to Opportunities as they move through the Pipeline.
Goal	A sales target that is beyond Quota.
Metrics	The Activity and Performance measurement standards applied to daily, weekly, and monthly targets.

Monthly Revenues	The amount of funds associated with delivered training for a specific month. Classes and enrollments are applied to the revenue for the month in which the class began. Coupons, clubs, and e-Learning subscriptions are deferred over a period of time.
Monthly Sales	The total value of signed or closed contracts within a given month.
Pipeline	The total value and number of all existing open Opportunities actively being developed by an individual or a center within a given timeframe, typically in 30, 60, and 90 day increments.
Portfolio	List of all Accounts and Prospects assigned to and managed by an Account Executive.
Quota	The minimum level of sales required.
Record	All of the information that is collected in the CRM for an individual Account.
Research	The process of collecting information about a particular Company for the purposes of being prepared to make contact with the Customer.
Territory	Geographic region in which the Center operates and has the right to sell and deliver training under its franchise agreement. This Territory also contains all of the potential business clients, so the geographic "territory" and the market "territory" may be used interchangeably.
Territory Management	The process for prioritizing and assigning existing and potential Accounts to sales people.
Tier 1, 2, and 3 Accounts	The three levels of account segmentation as determined by revenue potential and customer buying habits. - Tier 1 – account that buys or has the potential to buy more than 100 days of training in a year. - Tier 2 - account that buys between 10 and 99 days of training in a year. - Tier 3 - account that buys less than 10 days of training in a year.
Tiering	The process of categorizing Accounts based on potential and actual days of training. (see Tier 1,2, and 3 Accounts)

Product Related Terms

Term	Definition
Asynchronous	Does not occur at the same time. Opposite of 'Synchronous'
Asynchronous Learning	Learning which occurs without time constraints. Examples are self-paced courses taken via the Internet or CD-ROM, Q&A mentoring, online discussion groups, and e-mail.
Cisco Learning Credits	A payment method for authorized training redeemable with Cisco Learning Partners.
eLearning	Term covering a wide set of applications and processes, such as web-based learning, computer-based learning, virtual classrooms, and digital collaboration. It includes the delivery of content via Internet, intranet/extranet, audio- and videotape, satellite broadcast, interactive TV, CD-ROM, and more.
ILT	Instructor Led Training. Delivery options include Traditional Instructor Led Training, Mentored Learning, and Online LIVE.

Integrated Learning	Integrated Learning is the New Horizons training strategy that comprehensively and holistically guides learners through the five components of the learning life cycle: Assess, Learn, Reinforce, Support and Validate. We combine and interchange classroom training with technology tools and resources allowing for the most effective learning experience in the industry. Integrated Learning is a unifying concept that ties together all New Horizons products, teaching modalities, features and tools. It is one of New Horizons primary competitive advantages.
Mentored Learning	Mentored Learning (ML) is a classroom learning experience that blends instructor led training with technology training tools, allowing for a customized education experience.
ROI	Return On Investment, refers to the amount of money gained relative to the amount of money or time invested in a solution or service.
Seminar Events	A series of short and professional presentations that host Decision Makers and Prospects.
Software Assurance Vouchers (SAV)	Microsoft provided vouchers redeemable for training at Microsoft Certified Partners for Learning Solutions.
Synchronous	Something that happens at the same time. Opposite of 'Asynchronous'.
Synchronous Learning	A real-time, instructor led online learning event in which all participants attend at the same time and communicate directly with each other. See ILT.
Technology-based Training	Synonymous with 'eLearning'
TILT	Traditional Instructor Led Training. A training event where all participants and instructor are located within the same physical location. Synchronous Learning that is not eLearning.
Webinars	Synchronous web events.

Appendix 1 – Daily Flow Chart

The Daily Flow Chart provides a scheduled structure to each day to ensure that key activities are performed.

1 AE Daily Flow Chart - IST.xlsx

AE Daily Activity Flow Chart

	Monday	Tuesday	Wednesday	Thursday	*Comment*
7:30 AM - 8:00 AM	Sales Meeting				Monday- Arrive ready to go before 7:20 AM, T-W-Th-F - Arrive 7:45 AM - Ready to Go!
7:45 AM- 7:55 AM	Finalize Preparations and Staging of Work Zone				AE Wizard, CMS, Outlook, Pricing Calculators, Lead Sheets, Goals for the Day
7:55 AM- 8:00 AM	Morning Sales Huddle				Review of Previous Day Activity, Information Review for Current Day
8:00 AM - 8:30 AM	Meet, Greet, Tour				Meet with New & Returning Students (ACTED)
8:00 AM - 11:00 AM	Prospecting (Phone Zone)				Warm Calls/Predefined Strategy for Execution, Cold Calls from previously generated call sheets (min. 60 contacts required), Profile calls from both Warm and Cold Calls - executed from AE Wizard
10:30 AM - 10:45 AM	Break				Meet with New & Returning Students (ACTED)
11:00 AM - 12:00 PM	Collections/Prospecting				Collections calls driven by Aging Report, (printed/distributed during Monday morning Sales Meeting
12:00 PM - 1:00 PM	Lunch	Lunch & Learn	Lunch	Lunch & Learn	Tuesday & Thursday Lunch & Learns are Mandatory
1:00 PM - 3:00 PM	Call Backs				Calls to move Opportunities forward (Example: Completing 8Q's, Account Profiling) Moving the Opportunity to the next stage of the Sales Cycle. Closing Calls, Finalize Order Agreements, Invoice Request, Complete IFPO's
3:00 PM - 3:15 PM	Afternoon Meet, Greet Tour				Meet with New & Returning Students (ACTED)
3:00 PM - 4:30 PM	Call Backs				Continuation of Call Backs captured earlier
4:30 PM - 5:00PM	Prepare for the next day!				Pre planning: Includes AE Wizard Pre/Post Call research, Strategizing w/SM & GM regarding Opportunities, Securing Leads for Cold Calling Activities, Follow Up w/Operations for Private/Dedicated Events, Fine Tuning Presentations

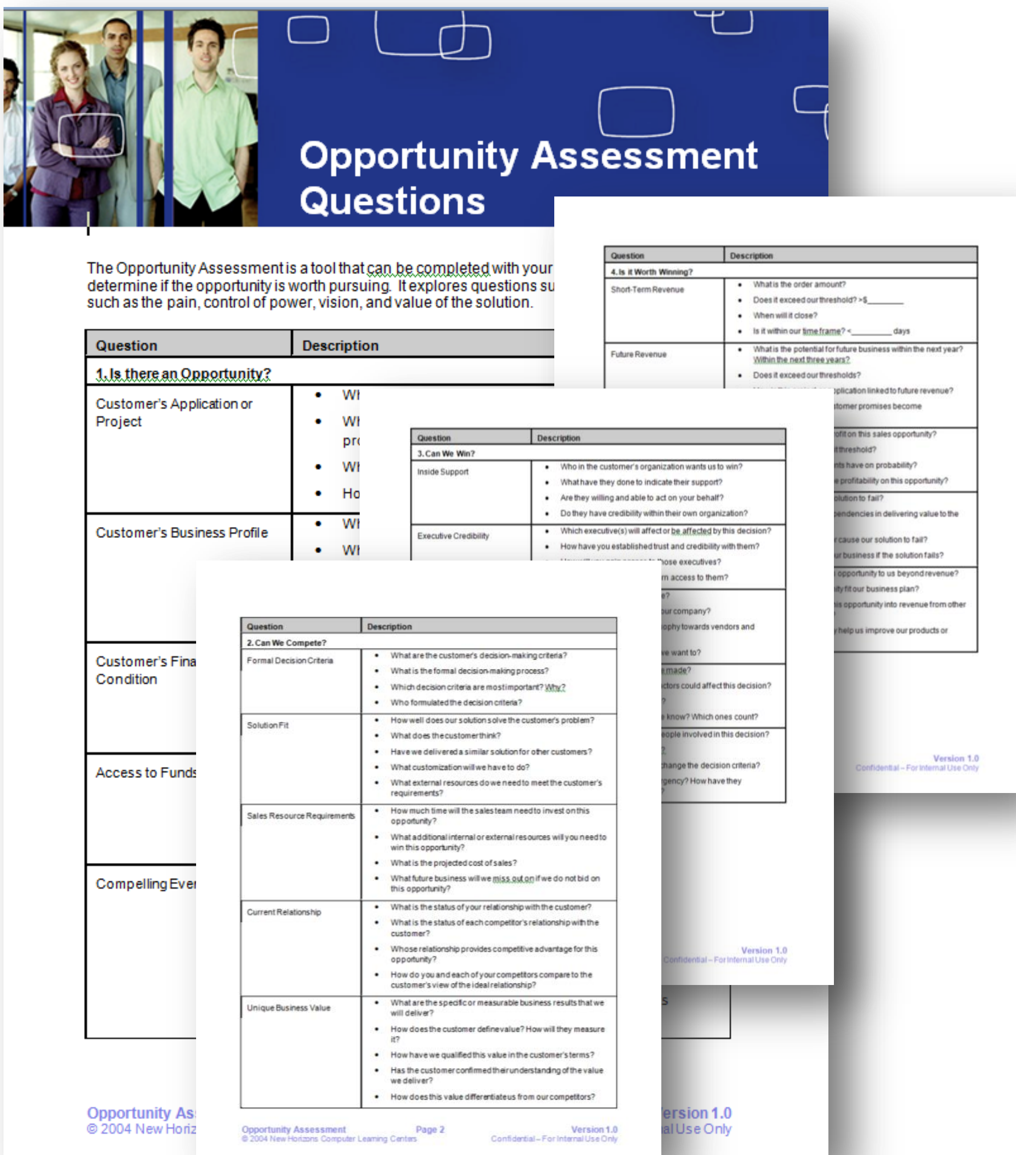
Minimum Expectations:

60 Calls, 2.5 Hours of Solid Phone Time
3-5 ACTED Accounts per Day
Proper CMS Utilization
Aging / collection reports cleared
Pipeline Growth/Stability to be in excess of 8X Monthly Sales Quota

Appendix 2 – Opportunity Assessment

The Opportunity Assessment is a tool that can be completed with your Sales Manager to determine if an opportunity is worth pursuing. It explores the questions surrounding the opportunity, such as the pain, control of power, vision, and value of the solution.

2 Opportunity Assessment.doc

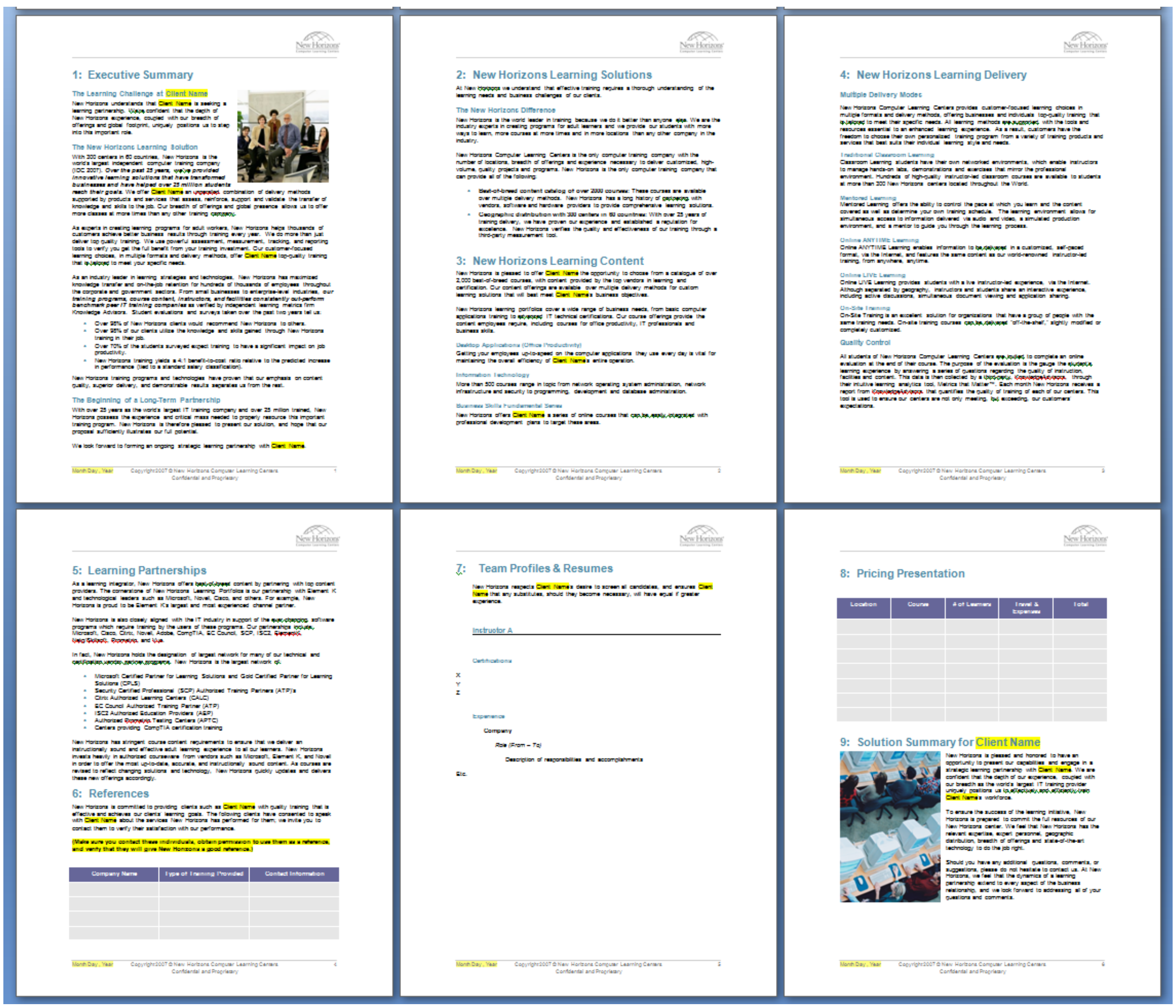


Appendix 3 – Proposal Templates

The Proposal Template SHORT is appropriate for clients who have a complex purchasing process, those with a relatively complex solution, or larger organizations with specific submission requirements.

The Proposal Template LONG is appropriate for RFP responses, very complex solutions, or first time opportunities with Tier 1 organizations.

3 Proposal Templates Appendix.zip


1: Executive Summary

2: New Horizons Learning Solutions

3: New Horizons Learning Content

4: New Horizons Learning Delivery

5: Learning Partnerships

6: References

7: Team Profiles & Resumes

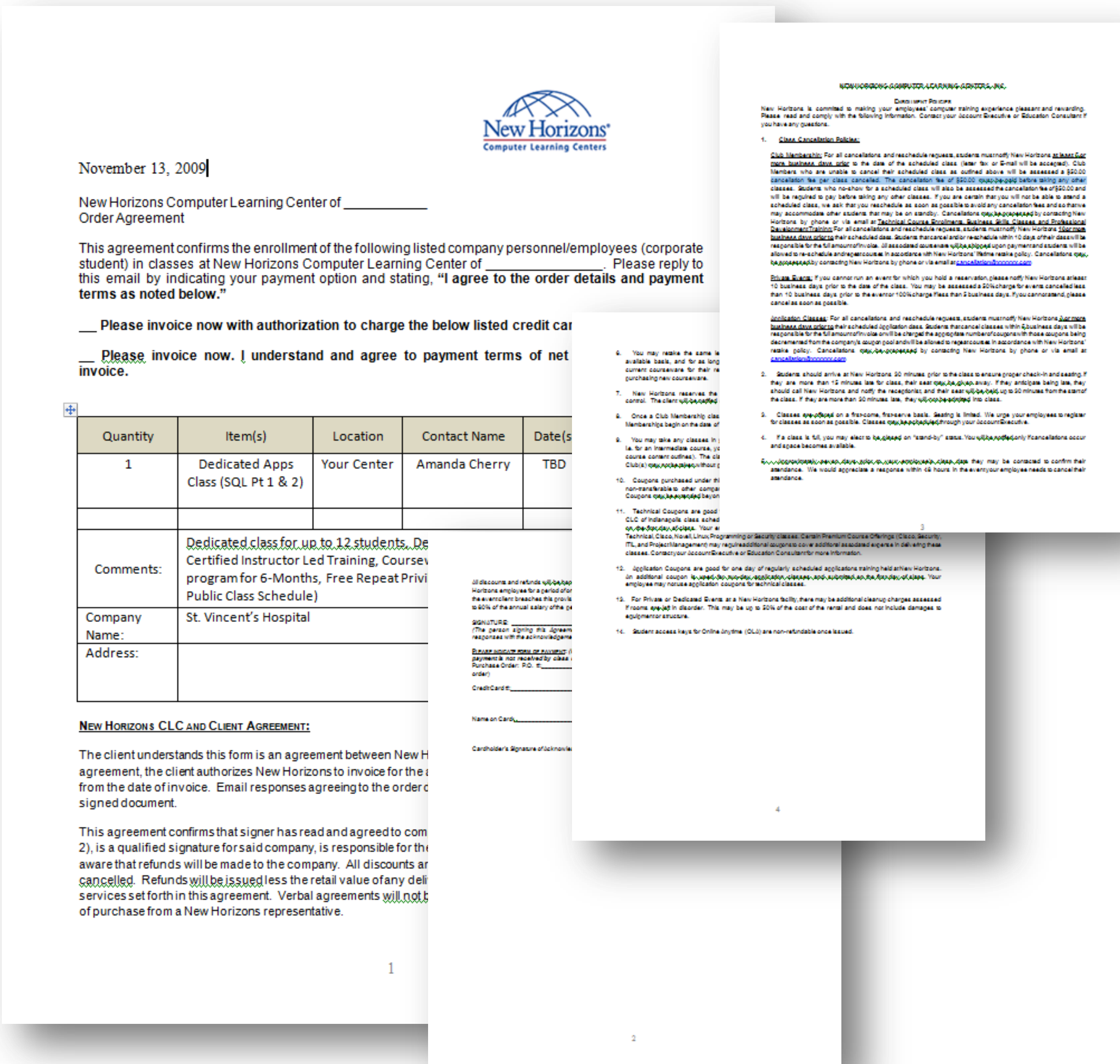
8: Pricing Presentation

9: Solution Summary for Client Name

Appendix 4 – Order Agreements

The Order Agreement is a contract that the client signs acknowledging that they have approved of the solution and agree to all delivery and payment terms. Do not change any legal language within the Order Agreement used at your center.

Master Order Agreement - October


November 13, 2009

New Horizons Computer Learning Center of ___________
Order Agreement

This agreement confirms the enrollment of the following listed company personnel/employees (corporate student) in classes at New Horizons Computer Learning Center of ______________. Please reply to this email by indicating your payment option and stating, **"I agree to the order details and payment terms as noted below."**

__ **Please invoice now with authorization to charge the below listed credit car**

__ **Please invoice now. I understand and agree to payment terms of net**
invoice.

Quantity	Item(s)	Location	Contact Name	Date(s
1	Dedicated Apps Class (SQL Pt 1 & 2)	Your Center	Amanda Cherry	TBD
Comments:	Dedicated class for up to 12 students, De Certified Instructor Led Training, Coursev program for 6-Months, Free Repeat Privi Public Class Schedule)			
Company Name:	St. Vincent's Hospital			
Address:				

NEW HORIZONS CLC AND CLIENT AGREEMENT:

The client understands this form is an agreement between New H agreement, the client authorizes New Horizons to invoice for the a from the date of invoice. Email responses agreeing to the order c signed document.

This agreement confirms that signer has read and agreed to com 2), is a qualified signature for said company, is responsible for th aware that refunds will be made to the company. All discounts ar cancelled. Refunds will be issued less the retail value of any deli services set forth in this agreement. Verbal agreements will not b of purchase from a New Horizons representative.

1

Appendix 5 – Naming Conventions

The CRM Naming Conventions provide the guidelines to how account names must be entered into your CRM.

5
CRM_Account_Namin

CUSTOMER RELATIONSHIP MANAGER
ACCOUNT NAMING CONVENTIONS

NHU
New Horizons University

EMPOWERING OUR NETWORK TO SUCCEED THROUGH INNOVATIVE LEARNING OPPORTUNITIES

Convention	Rule	Correct	Incorrect
Federal Government Departments	Do not spell out United States	- US Postal Service - US Marine Corp	- U.S. Postal Service - United States Marine Corp
State Government	Spell out the State	- California Department of Agriculture	- CA Dept of Agriculture
Local Government Institutions	Spell out the County or City	- Clark County Courts San Antonio Department of Corrections	- County Court SA Department of Corrections
City Government	Include the word City in name	- City of Miami	- Miami
Initials	No space or period	- ABB Power - BF Goodrich	- A B B Power - B.F. Goodrich
Initial Followed by a Word	No period	- A Apex Car Rental	- A. Apex Car Rental
Initials with an Ampersand	No space or period	- H&R Block	- H & R Block
Titles (such as Doctor)	Use period	- Dr. Steve Laws	- Steve Laws, MD Doctor Steve Laws
Apostrophes	Remove from name	- Harrys Bar	- Harry's Bar
Abbreviations	Do not use in name	- InfoTech Limited	- InfoTech LTD.
Names that Begin with Articles (A or The)	Do not include the article in the name	-Harford Group - Place Called Home	- The Hartford Group - A Place Called Home
Interfranchise	Spell out completely	- New Horizons of Chicago	- NH Chicago - New Horizons - Chicago

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Appendix 6 – Account Conflict Form

The Account Conflict Form must be completed when the ownership of an account within your center is being contested.

6 Request for
Conflict Opportunity.(

Request for Opportunity/Conflict Form

	Name:
	Other AE(s):

Account Name:		
Address:	City:	
Name of Contact(s)		
Department::	*Title:*	Phone:

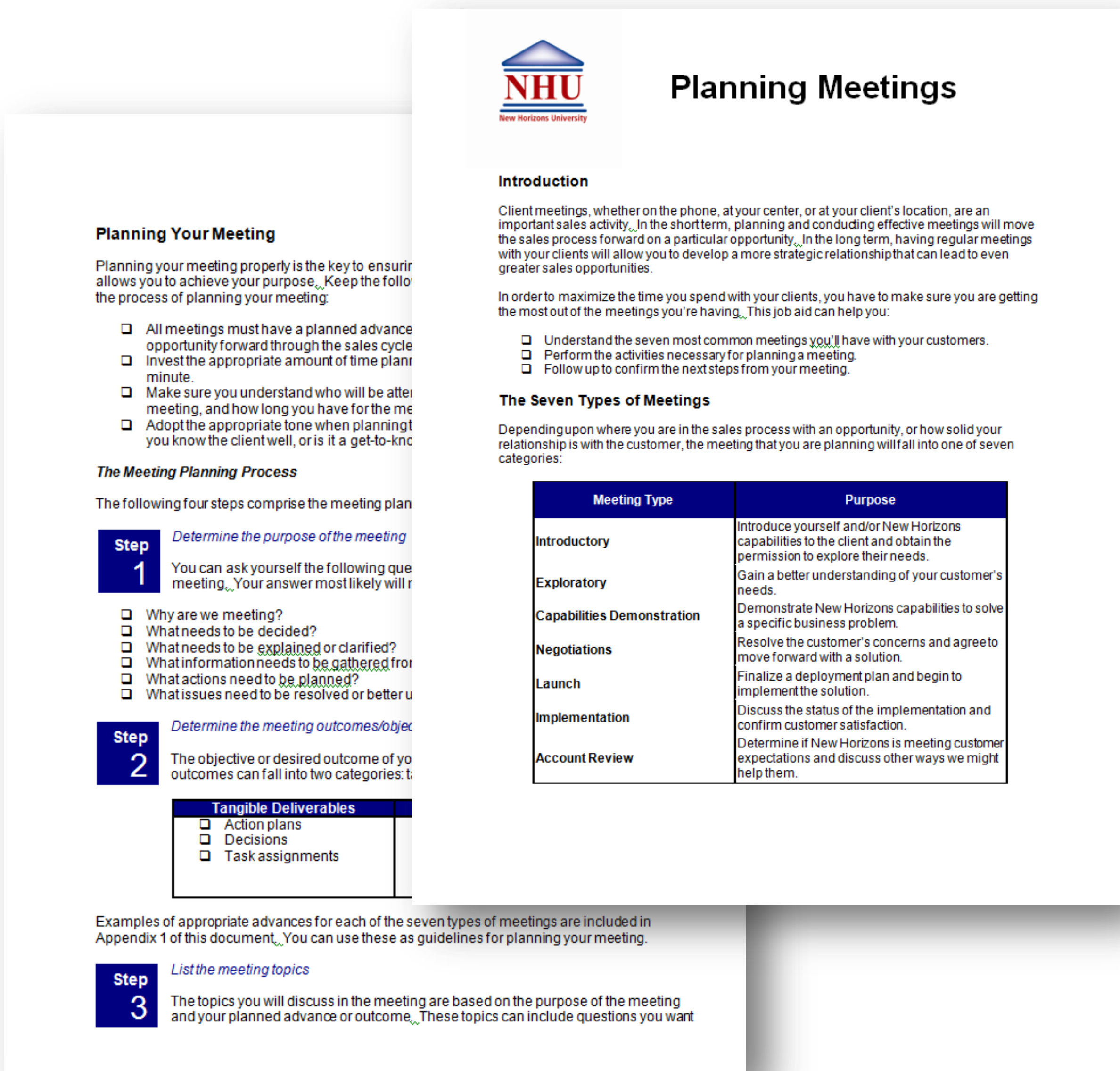
Complete the following Questions:	Yes	No
Is your Contact the Decision Maker?	☐	☐
Is Incoming Phone Call Justification attached?	☐	☐
Was this a referral?	☐	☐
If this is a referral, from whom?		

How did your Contact hear of New Horizons?
Scope of training opportunity?
Comments:

Appendix 7 – Planning Meetings

Instructions to planning for productive meetings. Provides sample agendas and questions to advance opportunities based on the type of meeting you are having.

7 Planning Meetings.docx



Planning Meetings

Introduction

Client meetings, whether on the phone, at your center, or at your client's location, are an important sales activity. In the short term, planning and conducting effective meetings will move the sales process forward on a particular opportunity. In the long term, having regular meetings with your clients will allow you to develop a more strategic relationship that can lead to even greater sales opportunities.

In order to maximize the time you spend with your clients, you have to make sure you are getting the most out of the meetings you're having. This job aid can help you:

- ❑ Understand the seven most common meetings you'll have with your customers.
- ❑ Perform the activities necessary for planning a meeting.
- ❑ Follow up to confirm the next steps from your meeting.

The Seven Types of Meetings

Depending upon where you are in the sales process with an opportunity, or how solid your relationship is with the customer, the meeting that you are planning will fall into one of seven categories:

Meeting Type	Purpose
Introductory	Introduce yourself and/or New Horizons capabilities to the client and obtain the permission to explore their needs.
Exploratory	Gain a better understanding of your customer's needs.
Capabilities Demonstration	Demonstrate New Horizons capabilities to solve a specific business problem.
Negotiations	Resolve the customer's concerns and agree to move forward with a solution.
Launch	Finalize a deployment plan and begin to implement the solution.
Implementation	Discuss the status of the implementation and confirm customer satisfaction.
Account Review	Determine if New Horizons is meeting customer expectations and discuss other ways we might help them.

Planning Your Meeting

Planning your meeting properly is the key to ensurin
allows you to achieve your purpose. Keep the follo
the process of planning your meeting:

- ❑ All meetings must have a planned advance
opportunity forward through the sales cycle
- ❑ Invest the appropriate amount of time planr
minute.
- ❑ Make sure you understand who will be atter
meeting, and how long you have for the me
- ❑ Adopt the appropriate tone when planning t
you know the client well, or is it a get-to-knc

The Meeting Planning Process

The following four steps comprise the meeting plan

Step 1 *Determine the purpose of the meeting*

You can ask yourself the following que
meeting. Your answer most likely will r

- ❑ Why are we meeting?
- ❑ What needs to be decided?
- ❑ What needs to be explained or clarified?
- ❑ What information needs to be gathered fror
- ❑ What actions need to be planned?
- ❑ What issues need to be resolved or better u

Step 2 *Determine the meeting outcomes/objec*

The objective or desired outcome of yo
outcomes can fall into two categories: t

Tangible Deliverables
❑ Action plans ❑ Decisions ❑ Task assignments

Examples of appropriate advances for each of the seven types of meetings are included in Appendix 1 of this document. You can use these as guidelines for planning your meeting.

Step 3 *List the meeting topics*

The topics you will discuss in the meeting are based on the purpose of the meeting and your planned advance or outcome. These topics can include questions you want