

## Maynardleigh- Business Development Meeting

### SPIN Sheet

1. Name of the Company: Manlife
2. Contact Name: Ekaque Bari, Mohini, Shipra  
Designation: IT Head  
Contact Details: Database  
Email Address: Database
3. Inquiry on/ Stated Need: Team Building
4. Meeting Mode: One-to-One/ Telephonic / Video Chat or SKYPE 25/9/17, 4 pm
5. Brief about the business ( OPR):  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
6. How does this company serve the " Basic human need"?  
\_\_\_\_\_  
\_\_\_\_\_
7. The Business Model:  
\_\_\_\_\_  
\_\_\_\_\_
8. Where are they mainly based? Hyderabad.
9. Employee strength: \_\_\_\_\_
10. Turnover: \_\_\_\_\_
11. Training Budget: \_\_\_\_\_
12. SPIN ( Ask four types of questions during this phase: Situation, Problem, Implication and Needs. the acronym of SPIN)

## SITUATION

i. Who are the target audience

43 - Band 4  
20 - Band 3  
7 - Band 5

ii. Job Profile ( understand how they contribute to Basic Human Need : try and take a simplified approach to how they serve this world )

SME, doing a good job.  
very high credibility  
Managers & above

iii. Age , Qualification - ( grade of colleges ....A or B or C ), Experience in years

iv. Span of control ( do they lead people , or , are individual contributors )

Leaders

v. What is the current state VS desired state (expectations- knowledge, skills, attitude, habit)

Current State	Desired state
<ul style="list-style-type: none"> <li>substantial improvement - VOC</li> <li>most people are driven by contribution to business - do right by the customer</li> <li>take on more than an chew.</li> <li>team wants to do right</li> <li>team getting themselves better</li> <li>customer happy</li> <li>More business responsible</li> </ul>	<p>(IDP)</p> <ul style="list-style-type: none"> <li>Stakeholder Mgt</li> <li>Personal effectiveness</li> <li>People mgt.</li> <li>Collect. credibility</li> <li>Art of saying influence</li> <li>No tactfully time</li> <li>Intelligence</li> <li>Ownership</li> <li>delivering accountable</li> <li>quality comm</li> <li>maynardleigh</li> <li>knowing I am</li> </ul>

<p>S=Situation</p> <p>Seek hard facts, and soft information, to understand the background and the opportunity you are facing</p> <p>Keep your questioning short but thorough</p>	<p>Sample Questions</p> <ul style="list-style-type: none"> <li>• How did you hear of MLA?</li> <li>• Why are we here?</li> <li>• Who really owns the issue—eg a particular line manager, the CEO, the HR person?—see also Miller Heiman: who is the customer?</li> <li>• What exactly does your company do? Is it currently profitable?</li> <li>• What is its position in the market place: eg a leader, number two, a newcomer?</li> <li>• How many people work for it and what is the turnover over staff—ie how are you managing your talent?</li> <li>• Where are your people mainly based, geographically?</li> <li>• What is the structure of the company—could I have an organisation chart?</li> <li>• Does your company have any key business goals you can share?</li> <li>• Who heads up HR or Learning and Development and who is their boss?</li> <li>• Who are the key people with responsibilities for training and development?</li> <li>• Would I be able to meet them at some time?</li> <li>• Do you have a budget for tackling this issue, if so what is it?</li> <li>• When do you finalise your training budget during the year?</li> <li>• Who else in the company might be interested in what we offer?</li> </ul>
--	---

Market share → 9.5 - 7.4 %  
 no new changes - 10 to 15 days  
 before high business volume  
 → sensing what is possible  
 and not possible.

→ no thinking through of 7-11  
interdependencies.  
→ what if I say 'No'! → self inquiry 7-11  
varies by external & internal  
→ How to change opinion smartly  
(if feeling pressure)

P=Problem	Sample Questions
Get the client talking about the issue and why it worries them, or why it matters right now as opposed to say last year.	Use what, when, how, why, who questions
Ask probing questions in a spirit of enquiry, making it a conversation not an interrogation	<ul style="list-style-type: none"> <li>• What is the issue exactly you want to tackle?</li> <li>• How would you describe it using of actual behaviour happening or not happening?</li> <li>• Why is it important to resolve?</li> <li>• What would be the financial benefit from resolving this issue?</li> <li>• Who has the most to lose by not tackling it?</li> <li>• Who has most to gain?</li> <li>• How many people are we talking about? --eg the target audience?</li> <li>• How long has this problem been happening?</li> <li>• How does it relate to or connect with the company's key business goals?</li> </ul>
I=Implication	Offer feedback: Have I understood your problem
Suggest the likely impact of what you have heard	Sample Questions
Check what you think this problem must mean for the company or the individual might it be costing, what insight can you offer at this stage about the ramifications of such a problem	<ul style="list-style-type: none"> <li>• If this is happening does it mean... (eg your team leaders have problems winning outstanding performance from their people?).</li> <li>• Would I be right that... (eg it's part of a wider issue of culture and change?)</li> <li>• From what you've told me so far you are probably... (eg really concerned about the future?).</li> <li>• Would I be right in concluding that one impact of this issue is.. (labour turnover is too high)</li> <li>• Does this mean therefore that.. (you have top management commitment to solve this?)</li> <li>• It would be worth spending some real resources to solve this issue then?</li> <li>• From what you've told me I would think that the</li> </ul>

→ People feel pressurized due to inability to manage time  
→ too much in the mode of delighting the customer

### PROBLEM

credibility very high → SME

- i. Gaps in performance, quality of relationships (repeated probe from previous question)

→ say yes & fails. team has killed themselves to deliver & still customer unhappy.  
→ intention very good

- ii. How have you arrived at these gaps (one person said, you observed, multiple leaders said, is it from training need analysis, is it a problem diagnosed at company level, has it come from a customer / consumer / partner / senior leader)

- iii. Validate the source of problem and try and rationalise it (percentage on customer score, talent engagement score, performance index, documented observations, result of a team hurdle). It will be good to record the name of the person who has articulated the problem statement. metrics

### Implication

- i. How has this problem impacted the business (ex increase in cost, decrease in revenue, opportunity lost, brand tarnished, attrition, low morale, reduced customer satisfaction, conflict, low internal service, wastage of time, money, bandwidth)

People demotivated: customer not happy. Excellence frame gets lost  
Quality suffering - missing on timelines

maynardleigh

## Need

- i. What according to you is the solution to bridge this gap

---

---

---

- ii. Have you tried this solution or any other solution in the past

---

---

---

- iii. How will you measure the effectiveness of this solution ( MOS – measures of success)

---

---

---

- iv. What does the solution look like to you ( modular , one day , two day , three months , bespoke , quickie )

1 day.

---

---

---

- v. What level of solution would you like to attend ( at the level of knowledge , or practise , or internalised)

---

---

---



13. Who heads up the HR or Learning and Development and who is their boss?

14. Who are the key people with responsibilities for Training and Development?

15.

	Yes	No	Requested	By when
Org Chart				
Competencies				
Gap Assessment				
Internal Survey				
Any other documents				

16. Your Learning Meeting/ CANI

17.

Deliverable ( Approach note, Proposals etc)	Date
Approach note	

18. Logistics: ( Have told them about Venue requirements)

When do you get your training budget during the year?

Date of Implementation: \_\_\_\_\_

Any Special Requirement: \_\_\_\_\_

Intent in ProgressIT: \_\_\_\_\_

Tick on Date: Cold/ Luke Warm/ warm/ hot/ Contract

19. Consultant's Name: \_\_\_\_\_

## Behavioural

- Stakeholder Mgt.
- Personal effectiveness
- People Mgt.

## Functional

LEAN IT.

IVOC - Internal voice of customer  
35%. Last year - 67% this year

## Hologram technology

\* Belief to change to be high  
instead of blaming the customer  
they think → if customer will  
give less "I will have less."

Belief - "I am responsible".

clarity  
People, to have ability to  
say "No" clearly without  
being aggressive.



2) How to improve productivity  
as a team?

→ (delegation)

↳ Main karunga  
Capability at the lower level  
but don't leverage the  
strengths

Delegate effectively

\* Impression to get credit from  
superiors

\* I know it best and will  
do it best.

for the business  
[Manage workload effectively]  
↑ efficiency

improve

productivity

Company first then delegate  
(Between Mussoorie & now Haridwar)  
(has changed → bring them together)

o Manage workload o

o Productivity o

Bob was in the load

Life of a Team

Assessing

Productivity

Knowledge of subordinates

Many

Delegation

Productivity

Team  
has  
changed  
they  
are  
together

70  
Band 3

Band 4

Band 5

Band

Productivity

① I am responsible - Ownership & Account

→ Clarity → I am responsible

→ Doubt → 'no'

→ Absolute is say 'no' factually

assertive and not beg.

→ I am here, managing with

Shot kan gar

Time not

Comrade

Thinking then

And then yes

What if say no → yes for this last time

How to create the person  
signature Steeleholder

no for like  
signature  
10-15 mins.

My  
Steeleholder  
up.

Productivity → Everything is dead?

True  
Delicate efficiency

I know it well, I tend.