



CBS ACQUISITION

# Cycle Of Development

download EVO App and get activated to begin learning



The first of four cycles of development aimed at teaching sales and business fundamentals



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# Introduction

**STARTING A NEW JOB IS NEVER EASY, BUT WE HOPE YOU'LL ASK FOR HELP, SPEAK UP, AND PUSH US TO NEW HEIGHTS. THAT'S WHAT HELPS US GROW TOGETHER AS A BUSINESS**

Sales is challenging in a multitude of ways, forcing one to develop both hard and soft skills in a unique need for balance that not every role will demand. This will have a positive impact on your skills and self confidence if you can commit to and trust the development process. As a people and NOT a task or process based role for the first two stages, it will force self reflection on character and patience. We are here to guide and mentor, but your honesty with us will always be key for that mentoring to be effective.

This booklet and the accompanying apps and training materials are meant to provide a path to follow, and a system to plug into. Embrace the learning and I hope you will be passing the information contained here down to your own team in the not too distant future.





# Sales Accelerator

get everything ticked off to move onto stage 2:  
leadership

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04



# First 10 Days Gauges

Track and your progress across the first two weeks of your sales accelerator

 01	Date:	Gauges	What Worked	Areas For Improvement	Office Goals	Field Goals
	02 Date:	Gauges	What Worked	Areas For Improvement	Office Goals	Field Goals
	03 Date:	Gauges	What Worked	Areas For Improvement	Office Goals	Field Goals
	04 Date:	Gauges	What Worked	Areas For Improvement	Office Goals	Field Goals
	05 Date:	Gauges	What Worked	Areas For Improvement	Office Goals	Field Goals
	06 Date:	Gauges	What Worked	Areas For Improvement	Office Goals	Field Goals
	07 Date:	Gauges	What Worked	Areas For Improvement	Office Goals	Field Goals
	08 Date:	Gauges	What Worked	Areas For Improvement	Office Goals	Field Goals
	09 Date:	Gauges	What Worked	Areas For Improvement	Office Goals	Field Goals
	10 Date:	Gauges	What Worked	Areas For Improvement	Office Goals	Field Goals



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# **Product Knowledge, Pricing and Competitors**

# 5 Steps To A Conversation

## 5 Steps to a Conversation

### Principle

The 5 steps is a skeleton structure of how we construct and conduct a conversation from start to finish to control impulse.

### Theory

- **Step 1 | Introduction:** We get one chance at a first impression
- **Step 2 | Short Story:** Explain your purpose in a concise fashion
- **Step 3 | Presentation:** Build value and decrease cost
- **Step 4 | Close:** Efficiently draw a decision, hopefully in your favor
- **Step 5 | Rehash:** Button up every conversation by outlining what will happen next

### Application

The skills the 5 steps teach are important for conversing, teaching, training and managing in future. Enter each conversation with a goal and the 5 steps regardless of the context or business and you can be assured of success in future.

## Introduction

### Principle

We get one chance at a first impression and the introduction is the ice breaker.

### Theory

What makes an introduction effective is the way you present yourself. An introduction is the first impression you make and can be made more powerful by using all of the 'S.E.E.' factors:

**S – Smile** – Is reflective, and also allows you to qualify from someone's response whether they should be someone you spend your time with.

**E – Eye Contact** – Builds trust and gives people confidence that you are being honest. Additionally it gives us control in the conversation. Eye contact exhibits confidence.

**E – Excitement** – Creates impulse and curiosity in your customer. If you are excited people will assume you are talking about something exciting, The opposite, though, is also true.

When you combine these factors with positive open body language and a strong tone of voice, you will get to more short stories without receiving early blocks and/or objections.

### Application

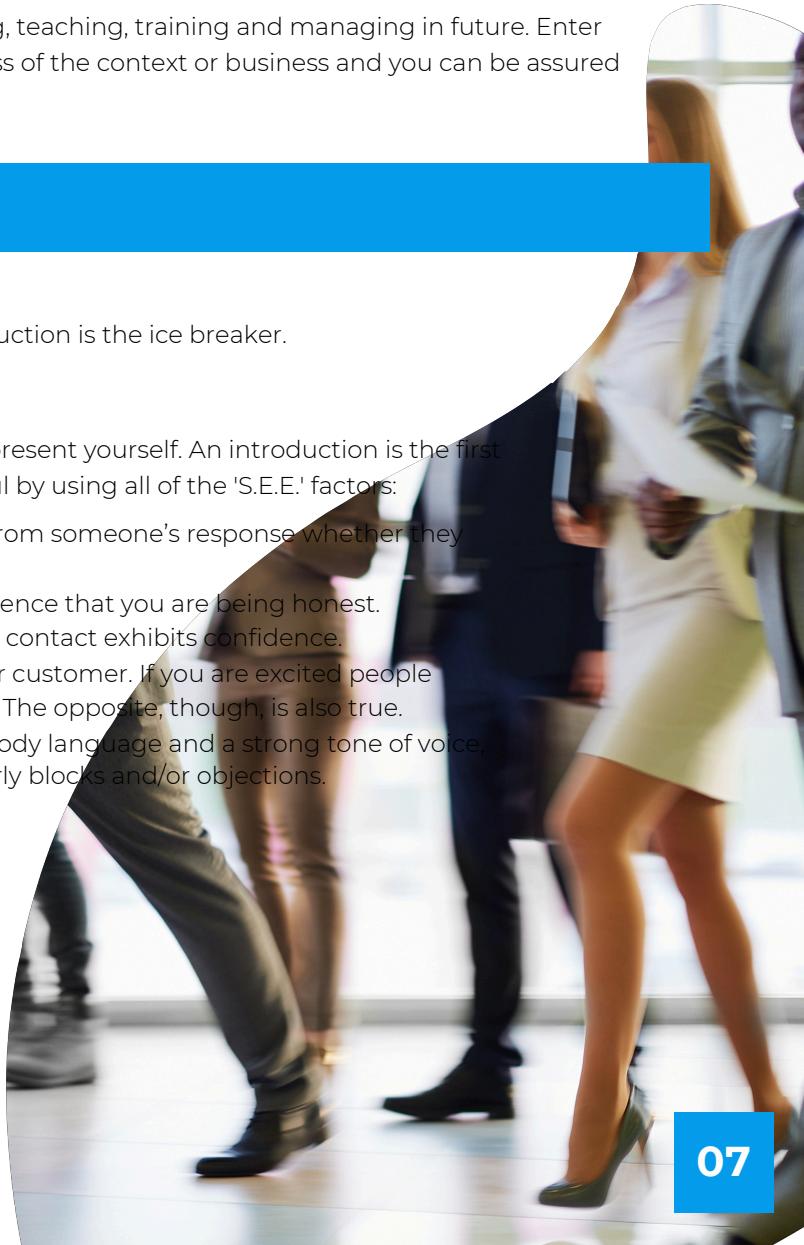
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# Short Story

## Principle

This explains who we are and what we are doing.

## Theory

We want to introduce why we need their time as concisely as possible by keeping in mind **K.I.S.S. v K.I.L.L.** In most cases it is more effective to get straight into qualifying questions than a long explanation of who you are and the client you are working for. Questions rather than closed statements will lead the customer into your presentation.



## Application

# Presentation

## Principle

This is where you build value and reduce the perceived cost of your product. The bigger the difference, the more likely you will create buyers.

## Theory



Stress the deal, which is to create a huge gap between the value of the product and its cost, by doing the following:

1. Painting pictures of how the customer will actually use the product and get them imagining they already have it
2. Understand the triple price breakdown: value minus cost equals savings

3. Make value and savings seem huge with expansive body language and words like "great, massive" and talk about money in dollars terms
4. Making cost seem small with body language which reflects this and words like "just, only" and talk about money as "bucks and cents"
5. Create problems and provide solutions (C.P.S.)
6. Yes, yes closed questions direct to the close, the more times the customer says yes to you throughout the presentation the easier it is for you to get a yes at the close.
7. Incorporate impulse factors
8. Throughout the pitch but particularly at the presentation creating a personal relationship with the customer (C.P.R.) is important to create trust and open the customer up to your close

## Application

# Close

## Principle

Make sure your conversations are driving towards conclusion, whether it be a yes or a no.

## Theory

Assume the sale and always be closing. We should presume that if we are at this stage in our 5 steps that we likely have a buyer and thus be assumptive, using **YES YES** questions rather than open ended ones. A close is not always a sale, rather it is pushing someone **toward a decision** to either buy or allow you to continue with your day and working your law of average. The first three steps will frame how often customers fall into the yes category, the close on its own does not create positives.



Most people who struggle with closing are simply not breaking the comfort zone that comes with asking for something. You increase the likelihood of the customer buying into your message/product the more confidence you demonstrate.

## Application

# Rehash

## Principle

The final and most important step to a conversation where we consolidate the sale. Thus sealing the deal and making the customer feeling great about what they just signed up for to eradicate any buyer's remorse.

## Theory

Rehash serves two purposes. Firstly **to capitalize on an already positive customer**, the acronym of rehash being Remember Everyone Has Another Sale Hidden. You already have someone who is a fan of and cheerleader of your product. Customers will buy from their friends much more readily than a stranger. This also ties in with the Jones Effect Impulse Factor.

Secondly we should consolidate and **leave our customers positive and understanding the next steps to keep our attrition rate low**. The number one cause of cancellations is lack of understanding. The Rehash maximizes personal profit and also our reputation with our clients.

## Application

# Read, Relax and Relate

## Principle

Read the situation, relate to your customer and thus relax the conversation.

## Theory

There are three things to read: the **environment**, the **demographic** of person and their **mood**. The theory behind this is that you do not want to force someone to come to your level of excitement or adapt to you or the environment as this will reduce the likelihood of them relaxing and therefore trusting you. This ties into the impulse curve and the idea you should always be just a little more excited than your customer as you go through the 5 steps.

	Environment	Demographic	Mood
Read	Busy, quiet, at customer's home, in a store, kids around, pets, on their own, in a couple or group	Older, younger, male, female, local or not	Open, closed, excited, indifferent, upset
Relate	Learn the appropriate body language and tone of voice, type of ice breakers and level of CPR to apply each person and scenario.		

# Creating Personal Relationships

## Principle

Creating a personal relationship with the customer.

## Theory

It is important to understand in sales that you are as much if not more the product as the clients you represent. When it comes to people buying from you, or being excited to work with you in a training capacity in future, you should look at the goal being to get people on your side as friends first then customers or business partners second.

## Application



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## Principle

Our goal is to win over members of the public by building great relationships and representing our clients to the highest standard possible. Our clients want customers that are excited about the features of their products and great value.

## Theory

Why is quality important?

- RETURN ON INVESTMENT-Cancellations. The longer the customer stays with ur clients, the more profitable they become and the more viable our campaign becomes.
- REPRESENTATION- How are we representing their brand? Compliance, Great customer experience.

### Early Cancellations

When we sign someone up, we must make sure that they become a quality customer, should a customer decide to cancel their order we will not receive commission for that sale. Take the following steps to prevent your customers cancelling their order:

- **Sign the right customers**- avoid selling to someone that is disinterested and makes multiple excuses as to why they can't sign up.
- **Do not misadvise**- if a customer later finds that you misinformed them, they are likely to cancel and complain about you. Keep up to date with your product knowledge-it's your responsibility to ensure the information you give is accurate.
- **Give the customer multiple reasons to sign**, avoid selling on price alone and get great at selling the key features of the service.
- **Do not sell on the basis that the customer can cancel in the cooling off period ever**. Because, they will. Learn to address and isolate genuine concerns and correctly overturn objections... the cooling off period is not a selling point.
- **Consolidate every sale** - address concerns, recap product info, re-impulse the customer and leave them on a high.

### Consolidation

A great consolidation ensures that every customer that we sign, feels informed and confident in their decision and they look forward to using and benefitting from their new service. We must cover the following components with each customer once the sale is completed:

- **Do they understand how to use the system?**
- **Basket breakdown**
- **What happens next? (explain the journey, outline how the first order will go)**
- **Do they have any questions?**
- **Welcome pack**
- **FINALLY... the last thing we do before the customer leaves is pre-empt the win-back!**

We work in competitive industries, companies will not let customers change without putting up a fight. Explain to the customer that their current provider will offer them a better deal, explain that it's not ok that they only do this when you're leaving them, ask them how they feel about it. Explain that they might get a better deal for 6 months but after that they'll be no better off.

**If our customer is left with any confusion it means we have not done our job correctly. Take pride when representing and understand that investing an extra 5-7 minutes with the customer can make a world of difference in the quality of customers we deliver. So... DON'T RUSH.**

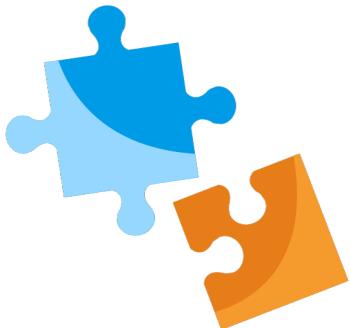
On the charity campaign we are judged by our Customer Lifetime Value (CLV). Stress that we are looking for a minimum 1-year commitment. Talk about the fact we have 3,4,5 year donors. It is particularly important in the charity rehash to create enormous impulse about the amazing work they are doing.

# Problem and Solution

# Principle

Closing becomes straightforward once a customer acknowledges a problem that we can then provide the solution to.

# Theory



Mark Cuban talks about sales in terms of recognising a problem and then providing a solution. If we can have a customer agree that to a problem and that we have the solution to said problem, closing becomes very simple. Sales shouldn't be combative but rather an agreement reached together. Problems include high price, poor quality, bad service and lack of support. We need to find that which applies to our product and customer.

# Gasman Theory

## Principle

When someone is there to do a job or perform a service eg the gasman checking the meter we will allow them to do that job without resistance.

## Theory

With some of our campaigns we are effectively providing a service rather than doing a sale. In these instances we need to have a different mindset and convey the indifference to back this up so we do not appear like a salesperson. Body language, tone of voice and verbiage are all key. What must be avoided is asking someone open ended questions that conflict with the concept of you being there to do a job. Eg if the gasman asked "would you like me to check your meter?" you would be confused and feel less confident in that individual.

## Application

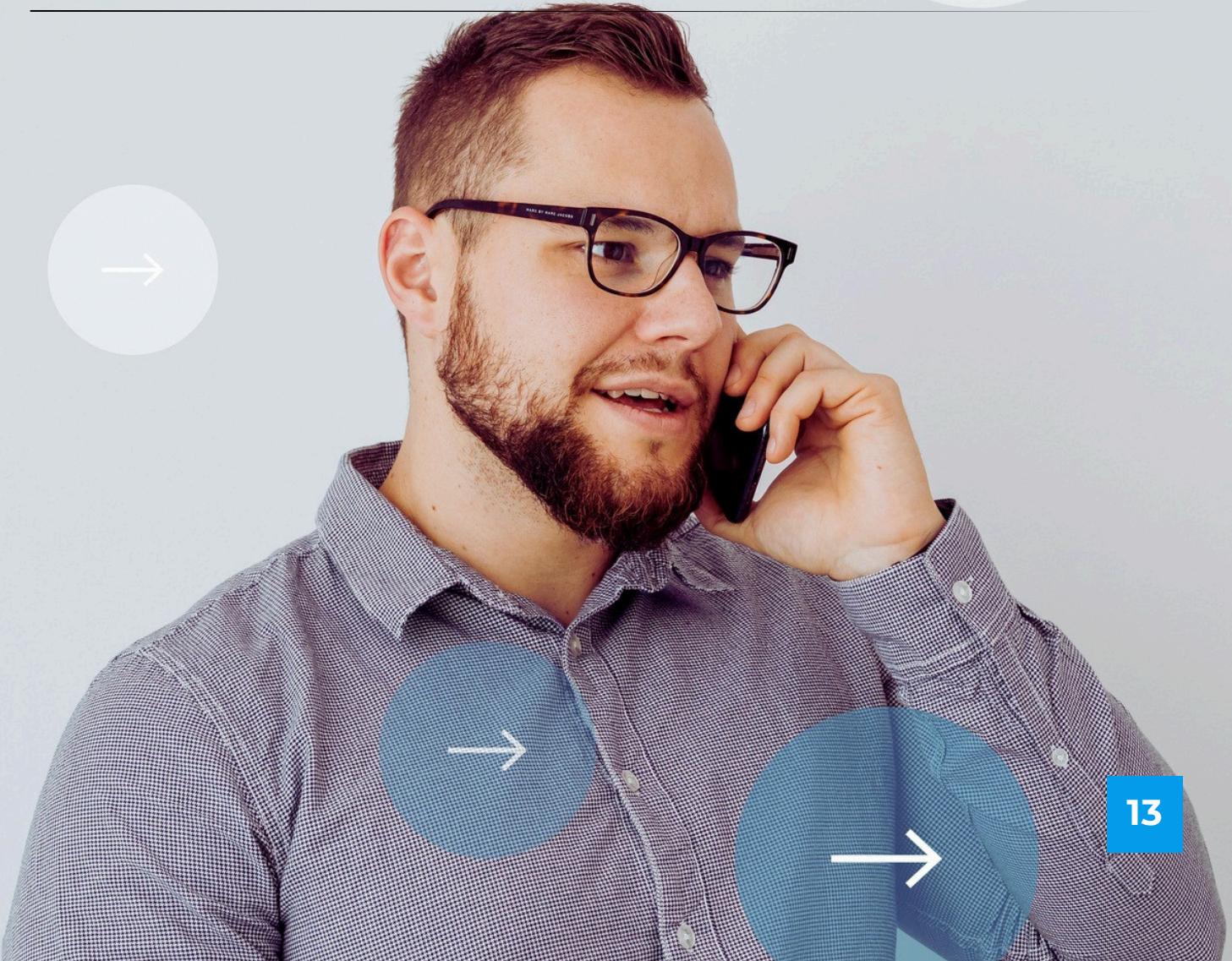
# The Checkout

## Principle

Reduce failed applications by preparing customers correctly for the checkout, placing their first order.

## Theory

The Checkout is something we put in place to protect both the agent and customer, and protects the longterm viability of our campaigns. We simply need to ensure that we know what questions will be asked and effectively preempt so that we do not allow any surprises which confuse and cause buyers remorse.



# The Law of Averages

The second foundation is to understand the principle of law of average and the systems which allow it to be properly applied. No matter how good your conversational skills, you will never have a 100% success rate and the LOA foundation is aimed at forging the steely mentality required to have success in sales and life. The more you can turn success into a game of numbers and work ethic the more replaceable and therefore longterm that success will be. There are times where someone has huge levels of personality or sales experience and can succeed without working the LOA properly, but these individuals do not go on to get promoted. This is due to these individuals relying too heavily on skill. Skill is not easily replaceable or reliable. A system is the blueprint of every step you take in order to attain that result. Thus easily copied and relied on.

## Law of Averages

### Principle

A system to find positive people. The law of average states that if you repeat an action enough times a ratio will appear.

### Theory

The Law of Averages is a proven system to find buyers amongst non-buyers and is imperative to understanding people.

When we talk about defining the buyers versus the non-buyers we must realize that our ratios will change depending on how successful we are at marketing the product and ourselves. A ratio could be 1:5 for those who have experience to 1:15 for those starting out in their sales career. An average ratio however, is 1:10. ie for every 10 people we speak to one will be a positive.

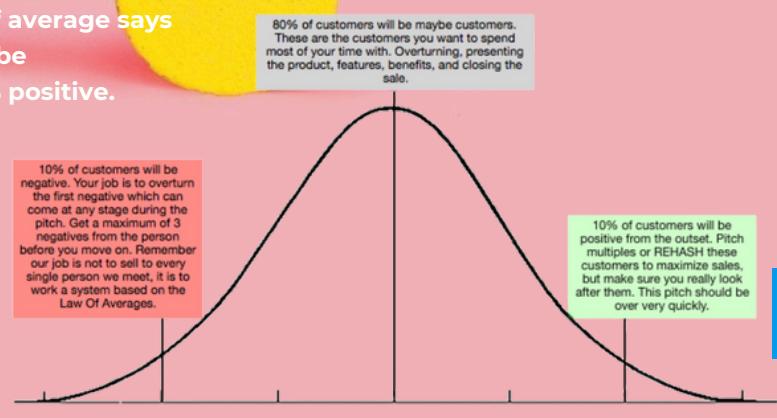
The three things that will affect your law of average are:

- Pitch: of course it is important that what you are saying is as accurate, concise and as impactful as possible.
- Pace: the more people you speak to the more positive people and sales you will find. This is easy in theory but requires the third part to be on point which is attitude.
- Attitude: you need to be consistently positive to allow the law of average to work, otherwise you will find it hard to keep your work ethic up and when you find positive people not turn them into negatives. Remaining consistently optimistic is a skill for people, sales and life as like tends to attract like. Positive people attract and create positive environments, and the opposite is also true.

### Application

When you flip a coin a few times, it will only rarely land 50% on heads and 50% on tails. But there will always be a more even distribution of each if you flip more times. In the field, the bigger the sample size I talk to, the greater my chances of the law of average working. I can't speak to only 10 people and then question my ratio. Commonly the law of average says that like a bell curve 80% of people will be indifferent to you, 10% negative and 10% positive.

The truest application of the law of average is to endeavor to speak to as many people as possible, as the larger the sample size of potential customers, the truer and more consistent the return. Again this is a combination of pace and attitude.



## 3 Types of Day

### Principle

Law of averages states that you will find your positives if you engage enough people with the correct pitch and attitude, but it doesn't necessarily state when those positives will emerge. This means that your attitude needs to be on point so that at any moment you may ready to close your positive customer when they appear.

### Theory

Typically there are 3 types of day:

○ = Yes • X = No

**A Day:** XX○XX○XX○XX○XXX

**B Day:** XXXXXX○XXXX○○XX○

**C Day:** XXXXXXXXXX○○○○

With the A day sales come early and it is very easy to maintain a good attitude. In the B day example sales come regularly and although not as easy as the A does not fully test your attitude. The C day where you have to remain positive and ready all day to be able to close your customers, who all come in the last hours, is the true test of who has belief in the system and is ready to train and build teams.

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## Gumball Theory

### Principle

The gum-ball theory is an analogy for the importance of persistence and pace in the field.

### Theory



If you took a gum-ball machine which had 100 candies inside, 97 red and 3 green, it makes sense that you would need to turn the hand up to 100 times to ensure you have got all the green balls out of the machine. Also with every red ball you remove from the machine you have become one step closer to finding the green ball. If you were to change the machine either by removing 50 red ball or add extra ball to the machine you would be altering the LOA of finding the green balls.

This is just like working you territory in the field, you have 100 customers many will be No's and 3 will be Yes's, its important to keep the attitude that every no is one step closer to a yes and never change territory or you will reset the LOA and it will start over again. The difficulty is that you cannot look into the field in the same way you can the gum-ball machine and see where the positive people are, you have to keep blindly turning knowing that your ratio will kick in.

### Application

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# Can v Can't Control

# Principle

To concentrate on the things over which you have control through reducing excuses and creating more consistent results.

# Theory

Most people spend their day blaming things that they have no control over as the reason why they did not succeed. Concentrating on things that are within your control is a lot more productive. Focus on seeing more people, having the same pitch as the high roller, and leaving every customer on a positive will guarantee success.

In the field there are many things that are out of our control, our mentality is that if we cannot control it then we do not think about it or talk about it. It is a waste of time and energy. Our focus then is on external factors other than things we can actually change.

In the field or **ANY SITUATION**, if something happens to throw us off course we ask a question... "Can I control it?" If the answer is "no" then we move on with enthusiasm. If the answer is "yes" then we do what it takes to maximise the opportunity that control provides. You should understand that the leaders who emerge in our business are 100% an example of can/can't control theory.

# Application

# Impulse Factors

Impulse is another word for excitement and the impulse factors are a number of techniques known as the FUGIES that we can use to raise people's excitement. This is particularly elective for converting the indiferent 80% of people into buyers. Different people respond di!erently, however to each of the FUGIES, and so you should get good at incorporating each of them and can use them all electively to be confident you have the best possible 5 steps to a conversation.

## F e a r o f L o s s

### Principle

The fear of loss is greater than the need for gain.

### Theory

People will more impulsively say yes as they if they perceive it as their last/only chance to purchase or sign up.

### Application

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## U r g e n c y

### Principle

Motion creates emotion.

### Theory

People are much more likely to make an impulsive buying decision if they have a shorter time frame in which to decide. In addition, having urgency suggests to a customer that you are busy and so you must be having success, hence your product is good.

### Application

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## G r e e d

### Principle

People are inclined to always want more of something, ideally for less in return.

### Theory

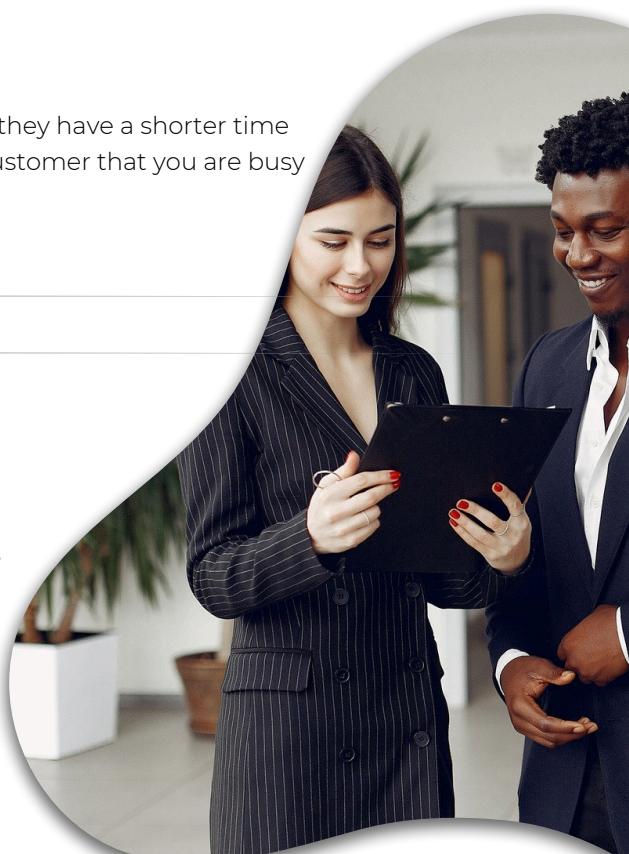
Your job is to create as large a differential as possible between the high price (product value) and the buy price (the financial or personal commitment required to purchase). The larger this differential in the head of your customer, the greater their level of impulse. Even better is to paint the picture of how they will spend or use the savings.

### Application

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# Indifference

## Principle

Indifference is being the opposite of a salesman.

## Theory

People naturally like to buy, but dislike to be sold to. You are not there to push them into anything, just stress the deal. Even if you are looking for buyers and making commission, your body language and word choice convey an image of indifference.

## Application

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# Jones Effect

## Principle

This comes from the phrase "keeping up with the Joneses", which describes people's tendency to copy others.

## Theory

While people may not naturally trust a stranger, especially where they know they are incentivized to sell, they will instead allow their friends, family or neighbors validate a product as the correct choice.

## Application

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# Suggestive Language

## Principle

Directing a conversation towards the outcome you want

## Theory

When asking questions, remove any option that can be translated as a no. Keep moving towards the close by putting the product into the customer's hand and/or filling the application whilst using yes, yes questions and future talk.

## Application

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# Quality Time With Quality People

Marketing is a contact sport, and wasting time and energy on the wrong people destroys your ability to be urgent enough to make the law of average work. At the same time we need to close our positives efficiently when we find them. There are various marketing systems assigned to being able to recognise buying and non-buying signs and allow you to adhere to the principle of Q.T.Q.P: spend quality time with quality people. As is often said, time is money.

## Impulse Curve

### Principle

You need to be able to build up impulse gradually throughout the pitch in order not to overwhelm the potential customer.

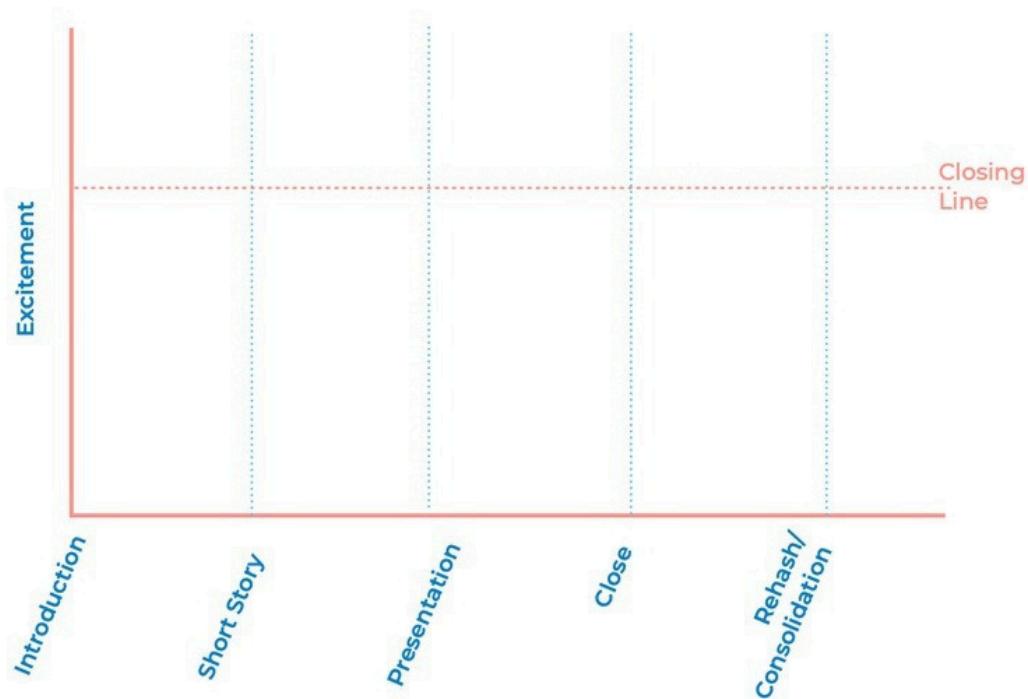
### Theory

The goal of the impulse curve is to be able understand and recognise how impulse increases throughout the 5 steps. This will allow you to recognise if you are relaxing and relating correctly at the introduction, and closing at the peak point of impulse.

We need to close the customer at the height of excitement, this is when they are most likely to say Yes. Therefore the excitement coming from us must escalate through the pitch. A common mistake is to intimidate people by being too excited at the start of your 5 steps.

The first golden rule is to meet the customer at a common point of excitement at the start of the conversation and build from there. The second is to close at the correct time, and the third is to remove buyers remorse with an impulsive rehash.

### Application



# OVERTURNING OBJECTIONS

Whilst on the field we repeatedly come across the same objections. These are not necessarily negatives or non-buyers but questions which, if answered properly, will often result in a sale. Objections can in fact be a buying sign. The key is to learn the replies, and the techniques which complement them. This can allow you to turn the middle 80% of indifferent people into customers and improve your law of average.

## BLOCKS AND OBJECTIONS

### Principle

By learning how to push past customer blocks and overturn objections, you can improve your law of average and profitability.

### Theory

Technique	When To Use It	How To Use It
AIR	For blocks early in your 5 steps. Blocks are uninformed nos. e.g.: notime, not interested, not buying anything.	Acknowledge the objections with an "I'm busy" or "I understand", but ignore it and then resume your pitch.
PRE-EMPTIVE STRIKE	In the introduction and short story if there are common negatives with the territory or the product that people keep giving.	If you give the negative before you take it from the customer, it is no longer a negative. For example, everyone is saying it is dark out. Be the first one to say "Wow, it's getting dark early, but quickly..." If you are hearing your client had service issues, 'Most people have been talking about how we used to have X issue, but the great news is...' The customer now has to listen as you have taken their negative away.
REPEAT/REASSURE/RESUME	This is the overturn when you get one of the minor but common objections for your campaign.	This is the overturn when you get one of the minor but common objections for your campaign.
FEEL, FELT, FOUND (FFF)	Where customer gives more serious issue/personal negative.	<p>Never argue with a customer, the feel, felt, found process will be more effective.</p> <p>"I know how you feel"—agreeing with them, which makes you different to the average salesperson and they will listen.</p> <p>"A lot of people felt the same"—relate it back to other customers so they know they were not alone.</p> <p>"What they found"—here is why they stopped thinking like that and moved to our service. This also uses EFFECT OF JONES.</p> <p>Insert 3 bullet points from BULLET THEORY.</p> <p>Close—"So how do you spell your name".</p>

### Application

## Principle

We want to arm ourselves with as many positive ‘bullets’ about our product or service, and also learn how to use them correctly.

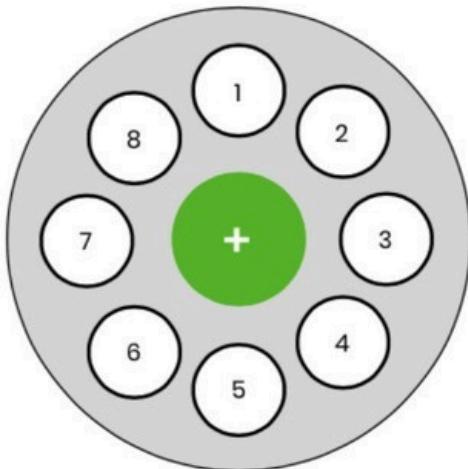
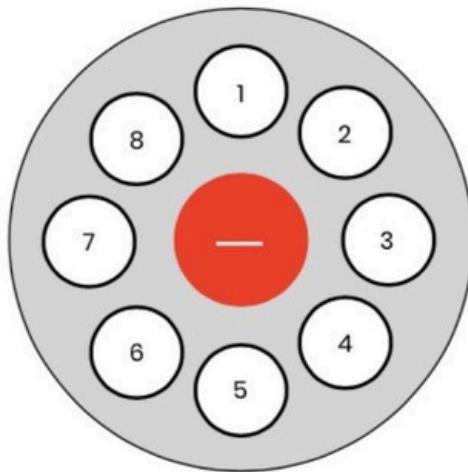
## Theory

Bullet theory comes from the analogy of a gunfight. The person with most bullets is clearly in control, as long as they preserve their ammunition.

Learn your bullets to walk into a conversation confident and armed, and be ready to fire quickly to build confidence in your overtures.

However, don’t machine gun fire every bullet at the beginning of your pitch, retain some so that no matter how many bullets your customer may have, you have more to fire back with. Keep bullets back for the steps 4 and 5, to make your close and consolidation stronger.

## Application



# Understand The Industry

We produced a number of short videos on nextexec, and your assigned trainee partner will cover off some important terminologies and understandings important to be able to explain clearly before moving on to a trainee partner role.

## Indirect v Direct

## CLV

## Office Revenue

## Our Advantages

### Cost

### Quality

### Coverage/Scalability

### Clients/Industries

# Understand The Industry

We produced a number of short videos on nextexec, and your assigned trainee partner will cover off some important terminologies and understandings important to be able to explain clearly before moving on to a trainee partner role.

## P r o m o t i o n   R e q u i r e m e n t s

### **Business Mentor**

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### **Business Development Coordinator**

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### **Office Partner**

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### **Office Owner**

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### **Postmanagement Criterias**

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## P r o f i t a b i l i t y

### **Quality**

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### **Business Trips**

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### **Profit Point**

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# Leadership Fundamentals

"Success is neither magical nor mysterious. Success is the natural consequence of consistently applying the basic fundamentals." As you start to learn and become a great representative on your campaign, these fundamentals relate more to your habits and leadership skills within and outside the office and are key to getting promoted to the next stage in your program.

## Goal Setting

### Principle

Always have a plan. Without a plan, you have no purpose. Without a purpose, there is no point. If you go to work on your goals, your goals will go to work for you. If you go to work on your plan, your plan will go to work for you.

### Theory

Goals are important to:

- Give you direction
- Give you focus

Always write down your goals and hold yourself accountable. Allow someone to evaluate your goals and hold you accountable to them. It is also important to set goals correctly using the SMART principle.

### Application

Different types of goals:

- **RESULTS goals:** Something that you have or something you want to achieve
- **ACTION goals:** Action that you have or are going to take to achieve your goals
- **SHORT TERM goals:** Things you do on a daily basis
- **MID-TERM goals:** Things you do on a weekly basis
- **LONG-TERM goals:** Things you do over a 6-8 weeks' period. Where you want to go in the future, what car you'd like to have, what office etc.

Work SMART:

- **Specific — What you want to achieve**
- **Measurable — Figures that can be easily evaluated**
- **Attainable — Show them to someone who can evaluate**
- **Realistic — Something that you or someone has done before**
- **Timed — In time periods: Day/Week/**

Be excited and motivated about reaching your goals. Reward yourself when you have achieved them.

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# Networking Meeting

## Principle

Build your network before you build your career. The more people invested in your success, and the greater the body of information and experience you have access to the more likely you are to progress and develop.

## Theory

The rule of 6 says that if you take the average position and income of the 6 people you speak to most often, that is the position and income level you can expect to be achieving within the next couple of years. Often the people you are most comfortable talking to are impacting your career the least positively.

## Application

Build a network of the following:

- **Mentor:** Preferably a senior executive or above whose advice you trust and can be honest with you
- **Coaches:** Senior managers who can give you coaching an objective view on your situation.
- **Accountability Partners:** people in the same situation as you, or just ahead, and doing the right things who you can compete with.

Avoid the distractions who make you feel better about your situation but are not aiding your personal growth.

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# Running a Rideout Meeting

## Principle

Taking someone less experienced under your wing for the day.

## Theory

To look at whether you are ready to lead on a full time basis, let us see that you can first do so on a daily basis. Can you take someone and improve their skills and mentality, do you have a positive impact on others?

## Application

Learn the strengths, weaknesses and background of the person you are taking out for the day and make a plan. Lead that person to have their personal best day and show that you can set the pace whilst juggling the responsibility of working with others.

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Finances inherently—whether or not it's incredibly short-term in just buying lunch for that day or long- term saving for retirement— help you accomplish whatever your goals are. And financial literacy is important because if you learn about it, it's going to teach you how to be efficient with your finances in such a way that you can accomplish more goals, and the goals that you do have, faster.

## Basic Rules of Financial Management



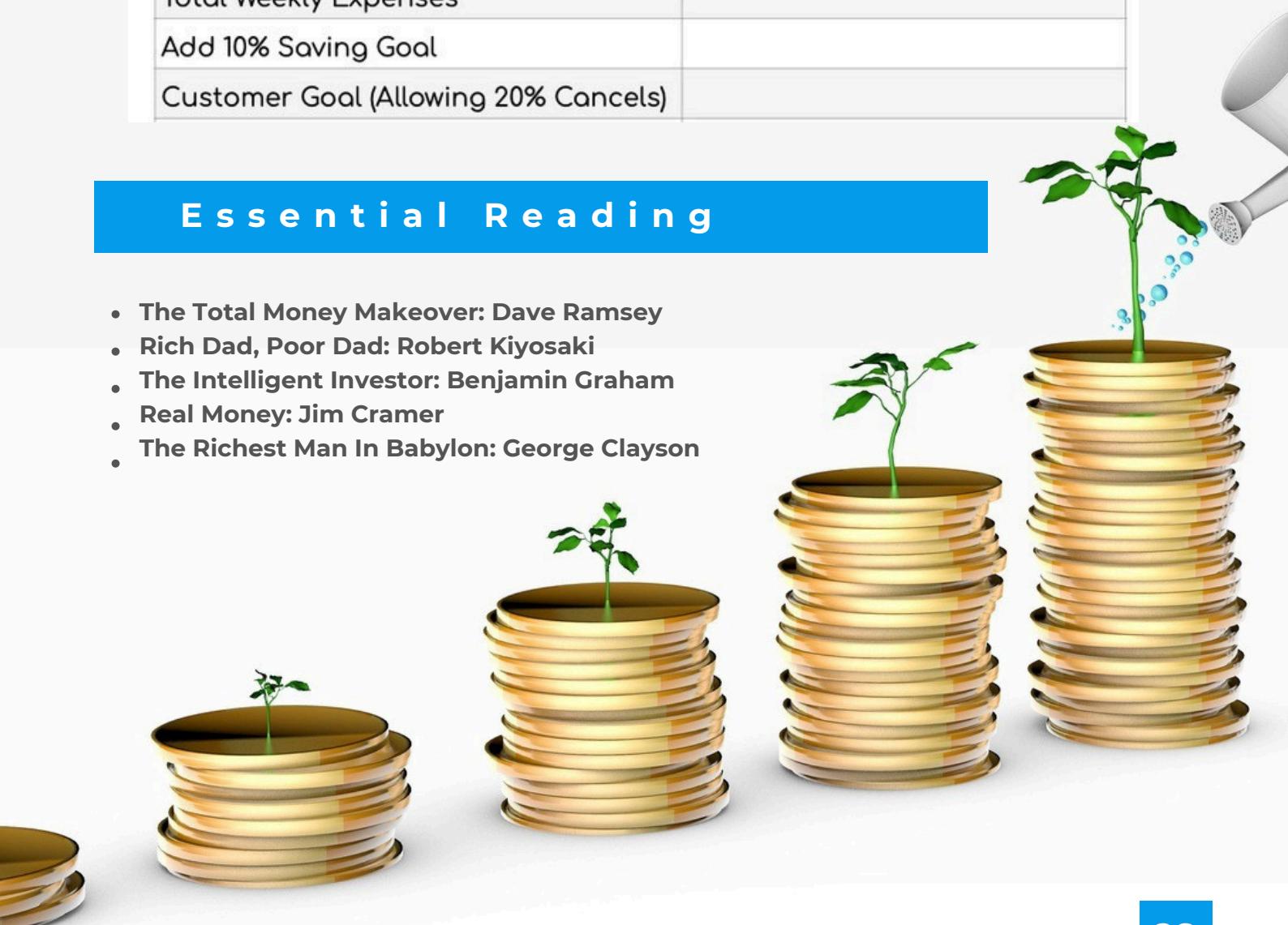
- 1. Schedule Your Money Minute** - Have a set time when you look at your financial progress
- 2. Compound Interest Is The 8th Wonder of The World** - A semi-aggressive investment will double in value every 10 years
- 3. Have A Savings Automatic Transfer** - 10% of pay every single week
- 4. Create Spending Rules** - Pick something like, I spend x on entertainment when I have paid credit card/ all bills first. Rewards are ok!
- 5. Share Money Goals With Someone You Trust** - Research found that people who write down their goals, then give someone weekly updates on their progress, were 33% more successful in accomplishing what they set out to do
- 6. Suspend Overspending Tools** - Cancel overdrafts if using them, put credit card on ice until you develop better habits
- 7. Never Shop Without A List** - 70% of shoppers admitted to making an impulse purchase in the last month and that more than 70% of those buyers regretted it later. That's why you need a plan before ever setting foot in a store/buying online
- 8. Have Buffers** - Have a 15 minute buffer on small-medium sized impulse purchases, have a week buffer on large purchases
- 9. Let A Bad Day Be A Blip Not The Start of a Slide** - If you eat a single cookie, you won't wake up fat. But remember, when trying to forge a new, responsible financial you, it takes time. A small money mistake today is just a chance to do better tomorrow.
- 10. Be Excited, Not Scared, To Learn Advanced Saving Strategies** - Get the basic habits down, but in the meantime start reading some financial books.

## Financial Breakdown

	total (translate weekly)
Mortgage/Rent	
Phone	
Transport	
Bills	
Entertainment	
Loans/Debt	
Others (specify):	
Total Weekly Expenses	
Add 10% Saving Goal	
Customer Goal (Allowing 20% Cancels)	

## Essential Reading

- **The Total Money Makeover:** Dave Ramsey
- **Rich Dad, Poor Dad:** Robert Kiyosaki
- **The Intelligent Investor:** Benjamin Graham
- **Real Money:** Jim Cramer
- **The Richest Man In Babylon:** George Clayson



## Principle

Impacts are a great way for you to promote yourself, share what you have learned with the new Account Executives and develop your public speaking skills.

## Theory

There are three parts to the great impact; choosing the correct topic, preparing in a structured fashion and delivering correctly.

## Application

### CHOOSING A TOPIC

- Impacts should focus on one specific subject area, people cannot apply too many things at one time.
- Impacts should talk about skill and technicals which can be implemented to increase the averages
- Talk to the other new people, and find out what the majority are struggling with. This is the easiest way to make an impact. People too often talk on subjects they like rather than areas the office needs and therefore there is no 'impact'.

The marketing systems in this booklet are all examples of suitable topics. Run your impact by your coach and take feedback before you deliver it:

### STRUCTURING YOUR IMPACT

- Principle = the topic you will be covering
- Theory = the concept of your topic
- Application = practical examples of how to use and implement the concept

### DELIVERY

- An impact should last a maximum of 5-7 minutes
- Be specific and don't wander from your topic
- Don't be inclined to turn it into a motivation meeting, impacts should focus on skill
- Use relevant examples and stories from the field to make it more interesting
- Refer to bullet points rather than reading word for word
- Ask questions, make it interactive, have fun
- Use your SEE factors. You learned in the 5 steps the skills you need to deliver a great impact



## Public Speaking Meeting

# Pre-Management Meeting

# Post-Management Meeting

# Leadership Quiz

"A leader's job is not to do the work for others, it's to help others figure out how to do it themselves, to get things done, and to succeed beyond what they thought possible." We promote example based leadership, so before progressing into leadership let's ensure an understanding of the basics covered in this cycle of development.

## Questions

1. Write Out The 5 Steps In Order, Along With A Summary Of The Important Principle of Each
2. What Are The Six Impulse Factors, And What Is The Principle Of Each?
3. Explain The Law Of Average As Applied To Sales, Along With The Three Factors That Affect It
4. What Is The Goal For Gauges On Your Campaign
5. Name 3 Things You Can and 3 Things You Cannot Control
6. Draw and Explain the Impulse Curve
7. Explain Qualifying and how to respond to each type of customer
8. Explain Each Overturning Principle
  - a. AIR
  - b. FFF
  - c. Pre-empt
9. Explain Working Territory On Your Campaign(s) e.g. Events Hourly Gauges/3 Lap System  
For Residential
10. Why Do We Promote Entirely From Within?
11. Why Do We Promote Based On Results Rather Than Length Of Time Worked?
12. What's The Criteria For:
  - a. Office Partner
  - b. Regional
  - c. Vice President
13. In your own words, please explain the reason you would like to progress to a leadership position?