Consultative Skills

PARTICIPANT GUIDE

CGI

WILSON LEARNING®

Consultative Skills

Participant Guide

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CONSULTATIVE SKILLS

THE BUSINESS OF VERSATILITY

Welcome to Building Relationship Versatility: Social Styles at Work

Purpose

The purpose of *Building Relationship Versatility* is to help you:

- Develop results-oriented communication skills for working effectively with different people.

Process

During these interactive modules that involve large- and small-group activity, you will:

- Define the importance of versatility and the benefits it can have on your work.
- Develop skills to help you identify the different ways people communicate.
- Reflect on the different expectations and preferences people have for those with whom they work and interact.
- Adapt the way you work with others in order to meet their expectations and preferences.

Payoff

As a result of participating in *Building Relationship Versatility,* you will:

- Skills and approaches that result in increased effectiveness, greater productivity, and better business results.

Notes:

The Business of Versatility: Overview

Purpose

In this module, you will learn to:

- Define the importance of versatility and the benefits it can have on your work.

Process

During this module, you will:

- Describe the benefits that building good relationships with others has on your effectiveness and on business results.
- Define versatility and its importance to your work.
- Describe a simple three-step approach for communicating and working more effectively with others.

Payoff

AS a result of participating in this module, you will gain:

- An appreciation for the importance that versatility has for your personal and business success.
- An approach for increasing your effectiveness with the people you work with.

Notes:

Video: The Challenge of Communicating

The situation

Kurt has been under a great deal of pressure to increase revenue. A client that Kurt wants to do business with has a reputation for pressuring suppliers in order to get the lowest price. Ben is in charge of providing the necessary bids to win the business. He doesn't trust this client. Kurt will try to convince Ben to help him put together a proposal for the client.

Answer these questions as you watch the video:

1. What were the results of this interaction?

2. What specific behaviors did you observe that contributed to the outcome?

   - Kurt's behaviors

   - Ben's behaviors

3. What effect did these behaviors have on their relationship?

4. What advice would you give Kurt about how to handle this interaction differently and more effectively?

Video: Versatility in Communications

Versatility is a conscious choice of behaviors that can improve the way people work together. If Kurt could make different choices about his behavior when talking to Ben, it might look like what you will see in the next video.

Answer these questions as you watch the video:

1. What were the results of this interaction?

2. What specific behaviors did you observe that contributed to the outcome?

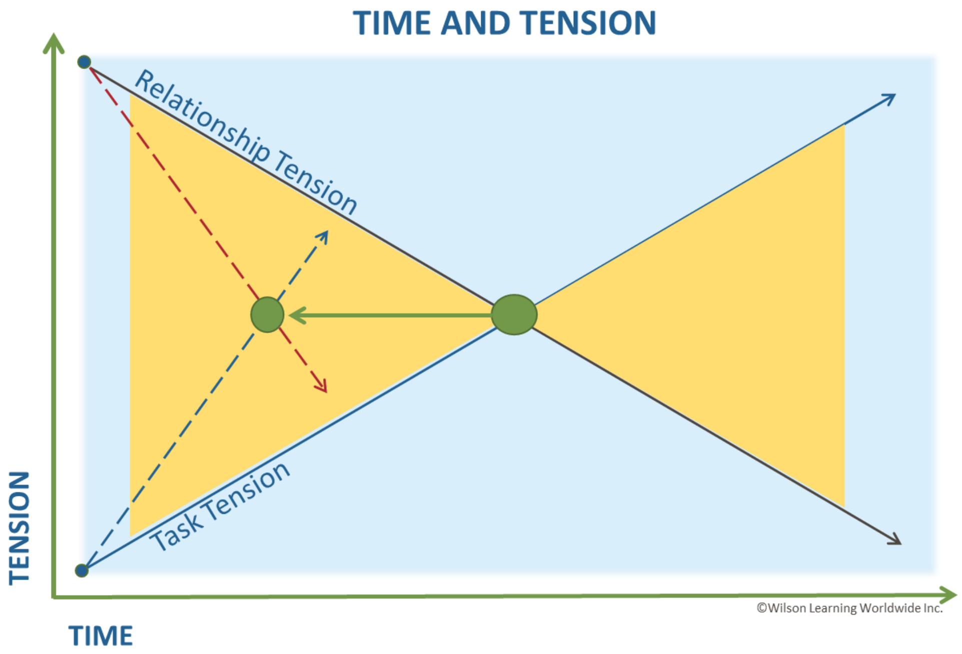
   - Kurt's behaviors

   - Ben's behaviors

3. What effect did these behaviors have on their relationship?

4. What effect did these behaviors have on accomplishing the task?

Time and Tension



Relationship Tension

Relationship tension is the discomfort or insecurity people feel when a relationship is new or when there is difficulty in the relationship.

Task Tension

Task tension is the level of interest or urgency that a person feels about working with someone on a specific task.

What is Versatility

The ability to adapt one's own behaviors to meet the concerns and expectations of others in order to create productive relationships

Benefits

Versatility helps you to:

- Increase your influence on and motivation of others.
- Gain commitment to your ideas, instead of compliance.
- Improve collaboration in your team.
- Increase your effectiveness and productivity, thereby achieving better business results.

Research

- Managers with higher levels of versatility are perceived as more effective by their direct reports, and they receive more positive performance reviews.
- Sales managers with higher versatility have sales teams that generate more revenue, have higher levels of customer satisfaction, and have greater employee satisfaction than sales managers with lower versatility.
- Companies with higher levels of versatility have better global working relationships than companies with lower levels of versatility.
- Managers with higher levels of versatility are more trusted by their direct reports than managers with low levels of versatility.
- Individual employees with higher levels of versatility perform better than employees who lack versatility skills.

The Versatile Response

Identify

Identify the person's Social Style.

"She or he is . . ."

Reflect

Based on the person's Social Style, ***Reflect*** on and describe her or his expectations for interactions with you.

"So she or he needs . . ."

Modify

Decide how to ***Modify*** your behaviors to maximize your effectiveness.

"Therefore I will . . ."

Gain the benefits of good working relationships by answering these three questions:

1. What is the person's Social Style?
2. What does this person expect from me interpersonally?
3. What can I do to improve my communication and relationship with this person?

The Versatile Response will help you to answer these questions.

Start/Stop/Continue

Start
Stop
Continue
Best Practices

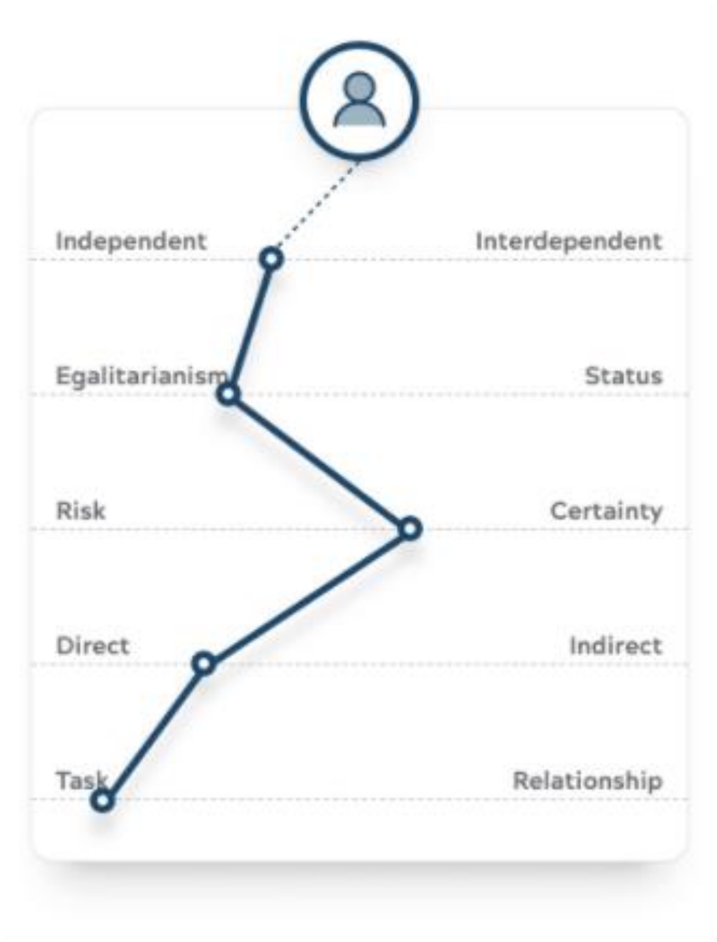
Application Exercise: Behaviors and Inferences

For this **Application Exercise**:

- List down 5 inferences that you made about your clients and what the behaviors were that led you to make those inferences.

- What were some of the negative consequences of these inferences?

Globe Smart Reference



Notes:

Consultative Skills

Identify Style

Identify Style: Overview

Purpose

In this module, you will:

- Develop Social Style identification skills.

Process

During this module, you will:

- Understand the fundamental premises of Social Styles.
- Define the two behavioral dimensions of assertiveness and responsiveness.
- Describe the four main clusters of Social Style behavior.
- Find out how people perceive your behavior in terms of the Social Style model.
- Develop skills to accurately identify others' styles.
- Apply Social Style identification skills to the people with whom you work.

Payoff

AS a result of participating in this module, you will gain:

- An ability to accurately identify others' Social Styles.

Notes:

Premises of Social Styles

- We are creatures of habit.
- People are different.
- We make judgments about other people's habits.

Video: Who is Easy or Difficult to Work with?

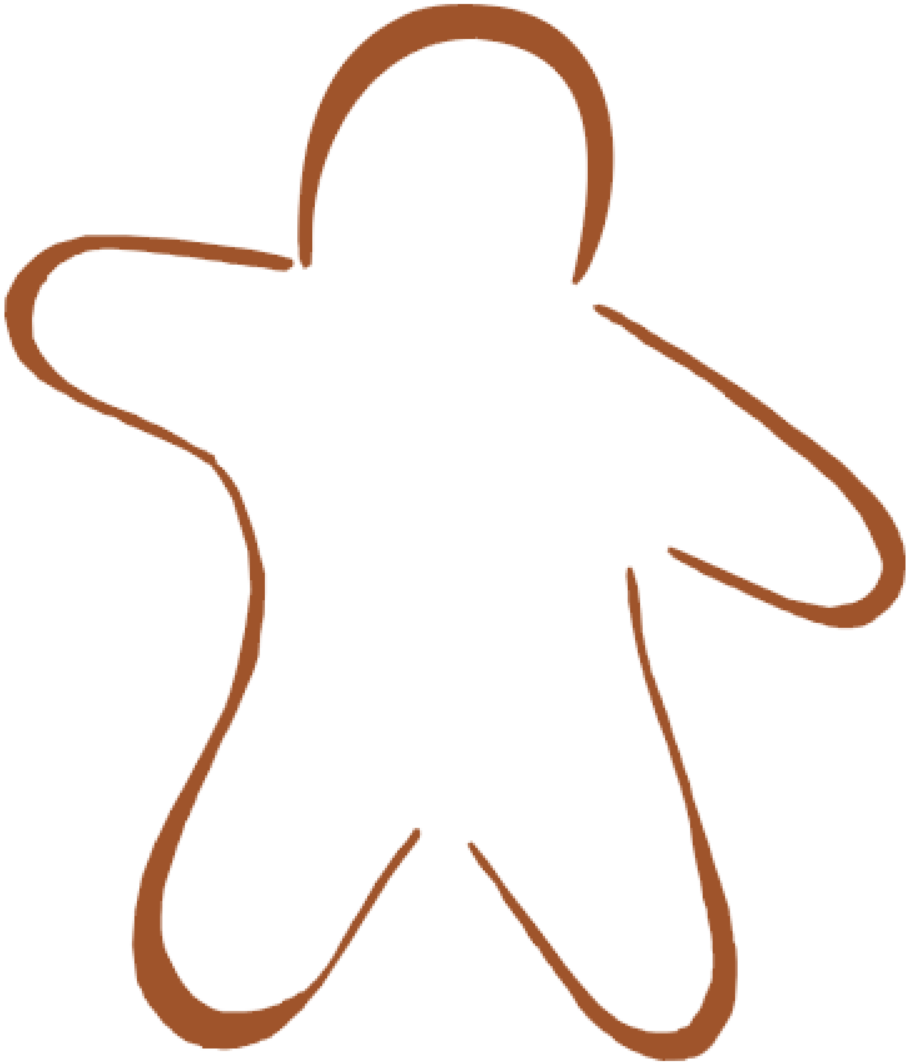
Which people would you find it easy or difficult to work with?

Write your reactions to each person in the video.

Person	Easy	Difficult
1		
2		
3		
4		

Premises of Social Styles

- We are creatures of habit.
- People are different.
- We make judgments about other people's habits.
- Focusing only on behavior allows us to avoid the pitfalls of judgment and understand what others need to work effectively with us.



Definition: Assertiveness

The way in which a person is perceived as attempting to influence the thoughts and actions of others

ASK Directed

TELL Directed

ASK Directed		TELL Directed
Indirect	**Approach**	Direct
Conditional	**Statements**	Declarative
More	**Questions**	Fewer
Slower	**Pace**	Faster
Few	**Interruptions**	Many
Leans Back	**Body Position**	Leans Forward
Quieter	**Volume**	Louder
Less Direct	**Eye Contact**	More Direct
Takes Time	**Decisions**	Responds Quickly

Definition: Responsiveness

The way in which a person is perceived as expressing feelings when relating to others

TASK
Directed

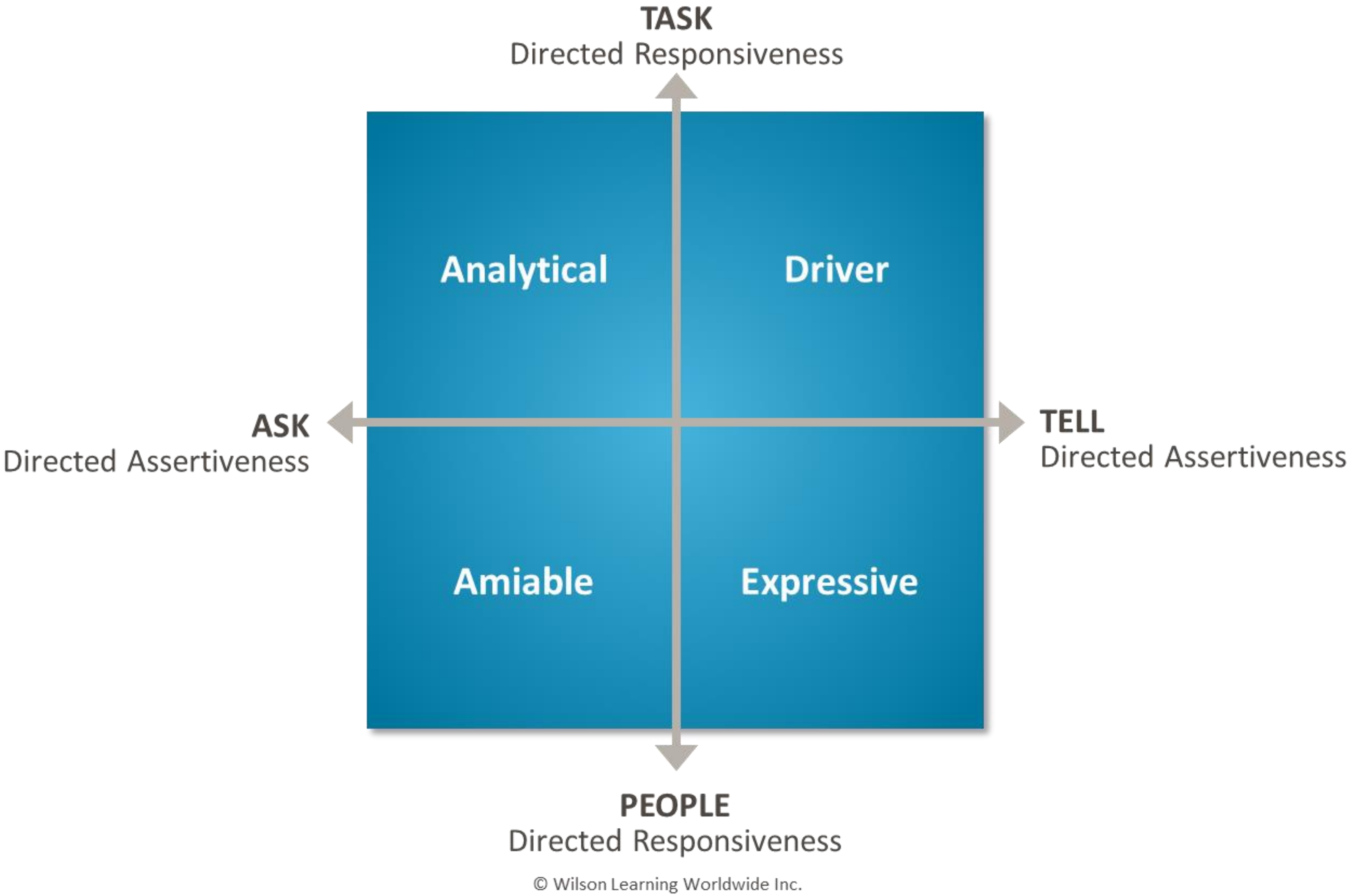
Focus	Facts first, relationship second
Gestures	Fewer, closer to the body
Tone	Consistent, even
Feelings	Share few
Facial Expressions	Fewer
Decision Making	Objective, relies on logic

Relationships first, facts second	**Focus**
More, away from the body	**Gestures**
Varied	**Tone**
Share many	**Feelings**
More	**Facial Expressions**
Subjective, relies on intuition	**Decision Making**

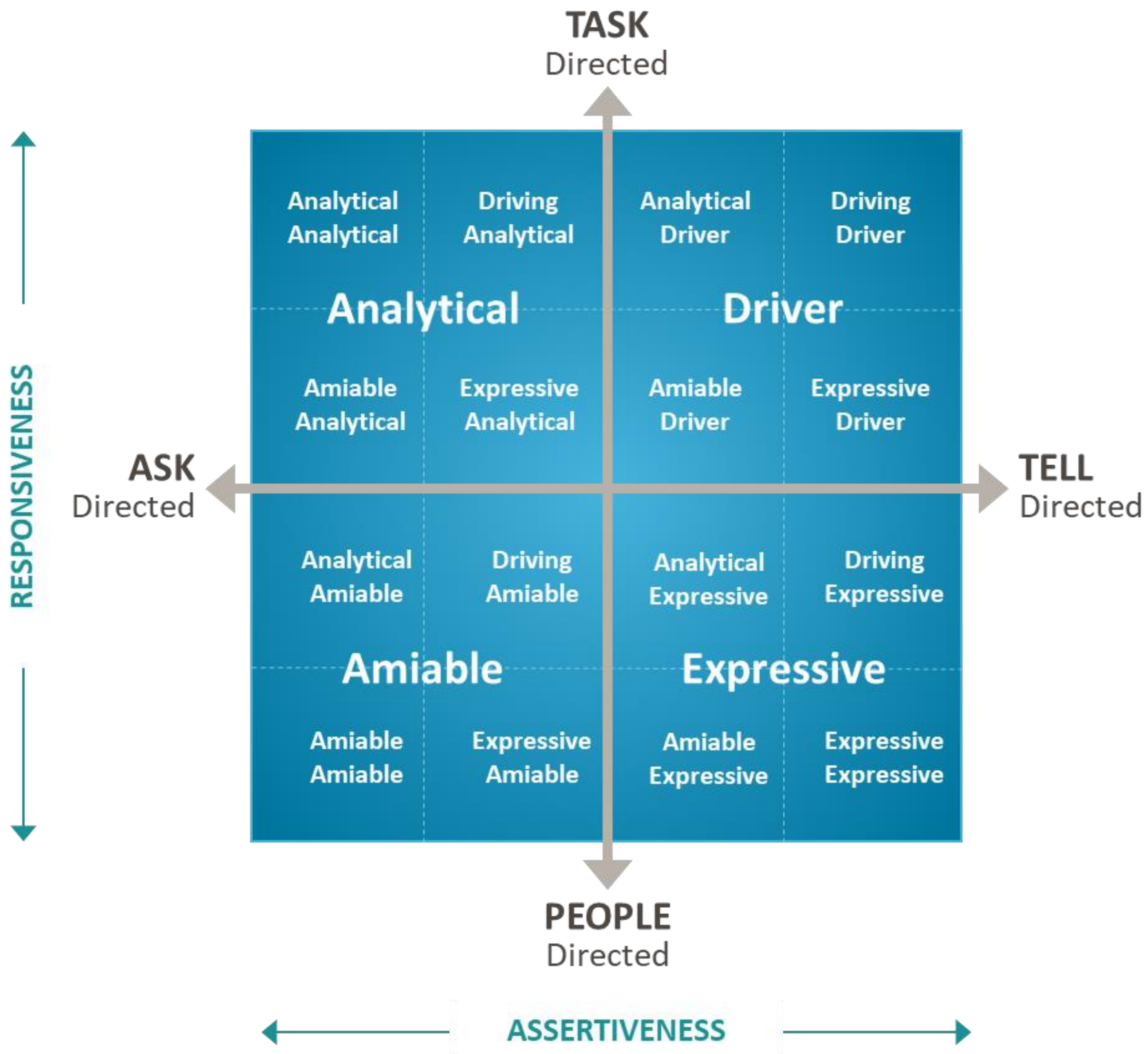
PEOPLE
Directed

Video: The Four Social Styles

Watch the video and record the key characteristics of each style in the appropriate quadrant.



The Social Style Subquadrants



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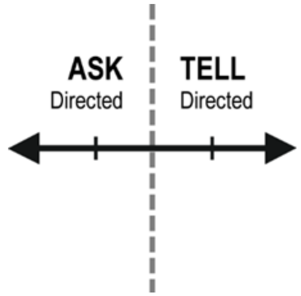
Style Identification Guidelines

Style identification is most accurate when observing one dimension at a time

Start with Assertiveness

Look for specific behaviors that will help you to identify assertiveness accurately.

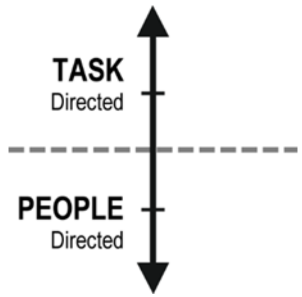
- Starting at the center of the assertiveness scale, ask, “Is this person ask directed or tell directed?”
- Look for pace (faster or slower), voice (more or less volume), and body language (forward or relaxed).



Consider Responsiveness

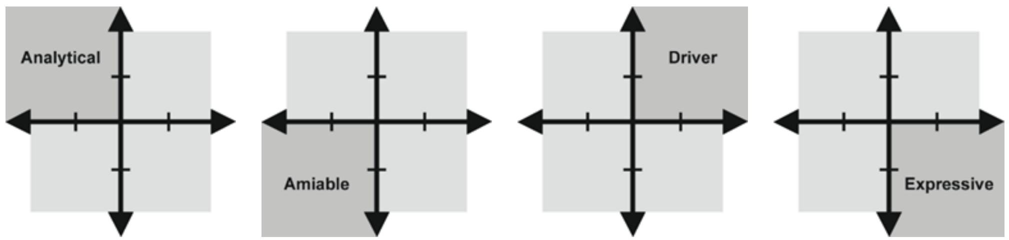
Look for specific behaviors that will help you to identify responsiveness accurately.

- Starting at the center of the responsiveness scale, ask, “Is this person task directed or people directed?”
- Look for voice (even or modulated), body language (less or more animation), and focus (primarily task or primarily people).



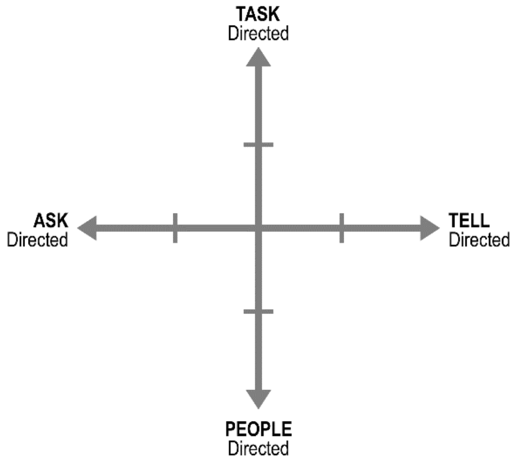
Identify the person’s Social Style

Put the two scales together. The intersection of your assertiveness conclusion and your responsiveness conclusion will indicate the person’s primary Social Style.



Style Identification – Behavior Clues

- Uses fewer gestures, minimal body language
- Has a consistent tone and voice inflection
- Shares and displays fewer emotions
- Displays less variety in facial expression
- Focuses dialogue first on task and facts



- Uses conditional language
- Asks more questions than statements
- Leans back
- Has a deliberate rate of speech
- Speaks at a softer volume
- Makes fewer interruptions

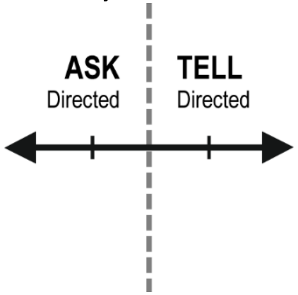
- Uses declarative language
- Makes more statements than questions
- Leans forward
- Has a rapid rate of speech
- Speaks at a louder volume
- Makes more frequent interruptions

- Uses more and wider gestures and body language
- Has a varied tone and voice inflection
- Shares and displays more emotions
- Displays more facial expression
- Focuses dialogue first on people and relationships

Video: Style Identification Worksheet 1

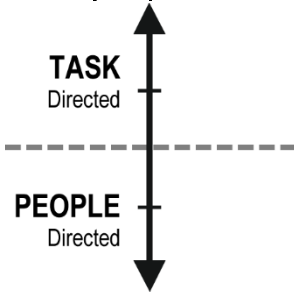
Person 1

Identify Assertiveness



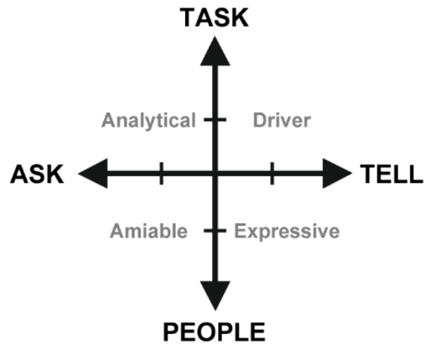
Why? (Assertiveness Indicators)

Identify Responsiveness



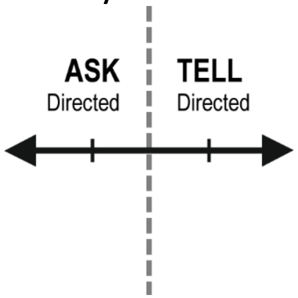
Why? (Responsiveness Indicators)

Identify Social Style



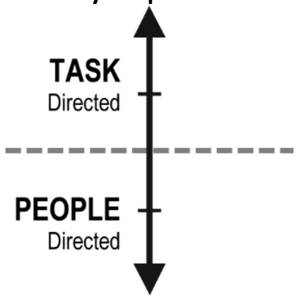
Person 2

Identify Assertiveness



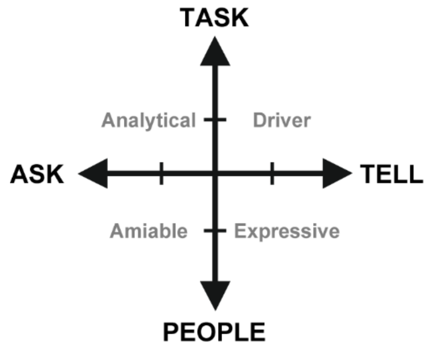
Why? (Assertiveness Indicators)

Identify Responsiveness



Why? (Responsiveness Indicators)

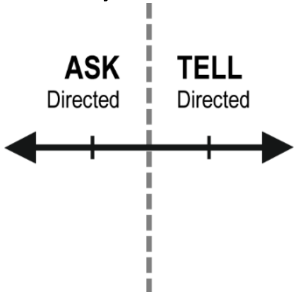
Identify Social Style



Video: Style Identification Worksheet 2

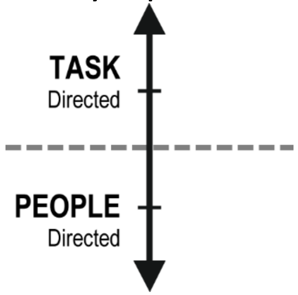
Person 3

Identify Assertiveness



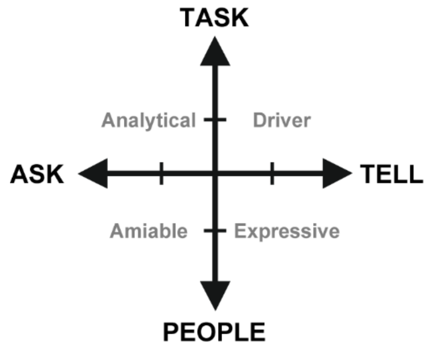
Why? (Assertiveness Indicators)

Identify Responsiveness



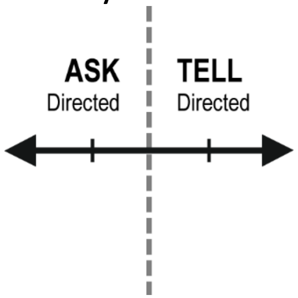
Why? (Responsiveness Indicators)

Identify Social Style



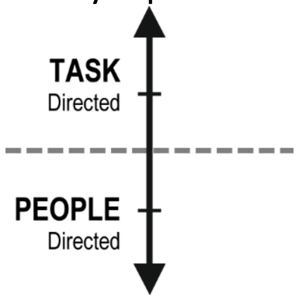
Person 4

Identify Assertiveness



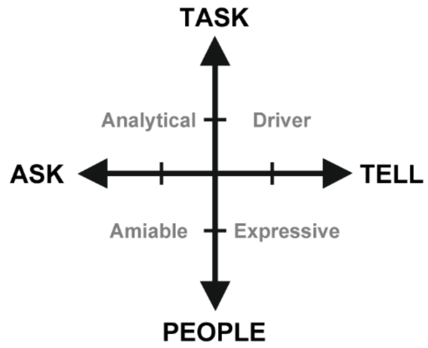
Why? (Assertiveness Indicators)

Identify Responsiveness



Why? (Responsiveness Indicators)

Identify Social Style



Tips to Help You Identify at a Distance

With e-mail/written communication

Notice the sender's priorities:

- Relationship first or task first.

Pay attention to the use of language.

- Declarative or conditional.

Does the person make use of any emoticons or unique formatting?

On the phone

When you are only communicating via telephone or e-mail, you will not have the advantage of observing body language.

- Pay attention to the other person's tone of voice.
- Ask the other person questions to discover their style preferences and expectations.
- Ask questions of other people who have worked with the person before to discover the person's behaviors and style preferences and expectations.

Examples:

First Meeting

If you have never met the person, you will not have the advantage of prior observation.

- Ask questions of other people who have worked with the person before to discover their behaviors and style preferences and expectations.

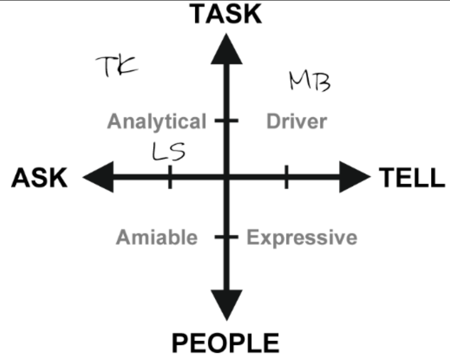
Examples:

My World at a Glance Example

- Write each person's name or initials in the appropriate quadrant (and/or record this information in the chart below).

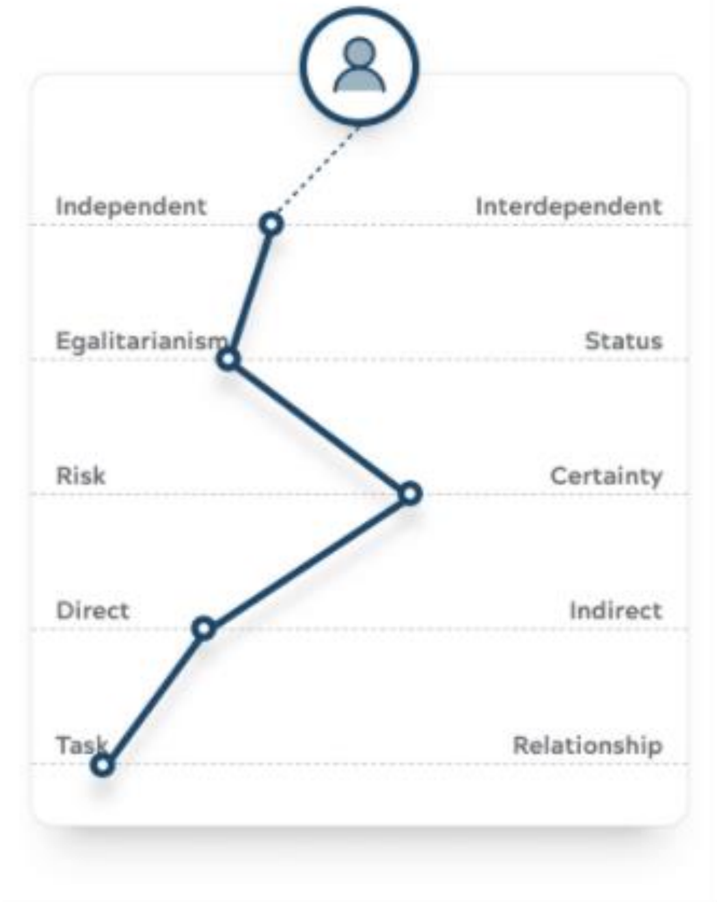
- Write your name or initials in the appropriate quadrant (and/or record your Social Style below).

My Social Style:



PERSON'S NAME: Lester Sommers	SOCIAL STYLE: Analytical
Assertiveness Indicators: What behaviors did you observe? Asks a lot of questions Fairly slow rate of speech **Responsiveness Indicators:** What behaviors did you observe? Sticks to business Few gestures and facial expressions	**Style Needs:** What does this person need from me? Clear specific information Time to think about it and make a decision
PERSON'S NAME: Maria Barbosa	**SOCIAL STYLE:** Driver
Assertiveness Indicators: What behaviors did you observe? Leans forward and makes direct eye contact Fast pace **Responsiveness Indicators:** What behaviors did you observe? Gets down to business immediately Not a lot of body language	**Style Needs:** What does this person need from me? Keep a fast pace to the way we do business Focus on the end results Don't bog her down with a lot of details unless she asks for them

Globe Smart Reference



Notes:

Start/Stop/Continue

Start
Stop
Continue
Best Practices

Application Exercise: My World at a Glance

Instructions:

- Select up to six people you work with and identify each person's style. Include at least two co-workers with whom you experience some working or relationship challenges that you want to improve.
- Use the **My World at a Glance Worksheet** (on the following pages) to accurately identify the style of each of your six co-workers.
  - Write the name or initials of each co-worker in the appropriate quadrant.
  - Write your own name or initials in the quadrant where you've been profiled.
- After you've completed the worksheet, answer the questions below.
  Your coach will review your submission and provide you with feedback.
- Set up a time to talk with your coach about your worksheet and responses.

What insights did you gain from completing this worksheet?

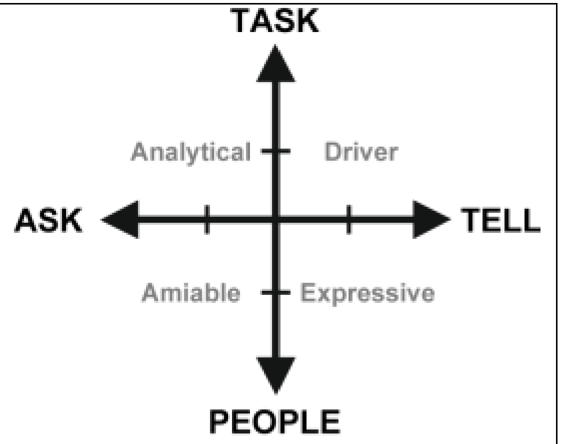
How will this help you in future interactions with others?

Application Exercise: My World at a Glance Worksheet

- Write each person's name or initials in the appropriate quadrant (and/or record this information in the chart below).

- Write your name or initials in the appropriate quadrant (and/or record your Social Style below).

My Social Style:



PERSON'S NAME:	SOCIAL STYLE:
Assertiveness Indicators: What behaviors did you observe? **Responsiveness Indicators:** What behaviors did you observe?	**Style Needs:** What does this person need from me?
PERSON'S NAME:	**SOCIAL STYLE:**
Assertiveness Indicators: What behaviors did you observe? **Responsiveness Indicators:** What behaviors did you observe?	**Style Needs:** What does this person need from me?

Consultative Skills

Reflect on Style Expectations

Reflect on Style Expectations: Overview

Identify
Identify the person's Social Style.
"She or he is . . ."

Reflect
Based on the person's Social Style, ***Reflect*** on and describe her or his expectations for interactions with you.
"So she or he needs . . ."

Modify
Decide how to ***Modify*** your behaviors to maximize your effectiveness.
"Therefore I will . . ."

Purpose
In this module, you will:

- Reflect on the expectations and preferences people of the different Social Styles have for those with whom they work and interact.

Process
During this module, you will:

- Describe the expectations and preferences for each of the four styles.
- Identify how these preferences apply to you on the job.
- Find out how some people perceive your versatility with them.

Payoff
As a result of participating in this module, you will gain:

- An Increased awareness of the different interpersonal expectations others have for you.

Versatility

The ability to adapt one's own behaviors to meet the concerns and expectations of others in order to create productive relationships

Conclusions about Versatility

- We're all versatile to some degree in our communications with others.
- Some people are more versatile than others.
- Versatility is situational.
- All of us can improve our versatility.
- The more versatile we are, the greater is our ability to communicate effectively with others.
- Versatility is a choice.
- Relationship Tension and Task Tension will be at more effective levels if we are more versatile.
- Managers with higher levels of versatility are more trusted by their direct reports than managers with low levels of versatility.

Reflect on Your Versatility

The versatility feedback you received is recorded on a scale similar to the one below.

Lower Versatility

- **Uses same behaviours with everyone**
- **Stays in own comfort zone**
- **Prefers own way of working**
- **Focuses inward**

Higher Versatility

- **Uses different behaviours with different people**
- **Reaches out to others' comfort zones**
- **Adapts to others' ways of working**
- **Focuses outward**

High Versatility Skills

- Recognizes signals that tension is increasing in an interaction
- Takes steps to reduce interpersonal tension in an interaction
- Adapts easily to different social situations
- Modifies own behavior to help others feel more comfortable in an interaction

Reflect: How to Do It

Your Modify strategy will be based on what you have learned about the expectations and preferences of the different styles.

Ask yourself these four questions:.

Four Reflect Questions

1. What would this person expect of me?

2. What would I have to do to meet their expectations?

3. What do we share in common?

4. What are the differences between us?

Summary of Style Preferences

	Analytical	Amiable	Driver	Expressive
Primary Asset	Systematic	Supportive	Controlling	Energizing
Back-up Behavior	Avoiding	Acquiescing	Autocratic	Attacking
For Growth, Needs to	Decide	Initiate	Listen	Check
Measure of Personal Value	Respect	Approval	Control	Recognition
Needs a Climate that	Describes	Processes	Responds	Collaborates
Let Them Save	Face	Relationships	Time	Effort
Make an Effort to Be	Accurate	Cooperative	Efficient	Interesting
Support Their	Principles and thinking	Relationships and feelings	Conclusions and actions	Vision and intuition
Stress Benefits that Answer	*How* the problem is solved	*Why* the solution is the best	*What* the solution will do	*Who* else has used the solution
For Decisions Give Them	Evidence and service	Assurances and guarantees	Options and probabilities	Testimony and incentives
Follow up with	Service	Support	Results	Attention

Application Exercise: The Versatility App

The Versatility App allows you to review content on the go. Open and bookmark the Versatility App on your phone or tablet. This handy tool will help in identifying other people's Social Style and share tips for having better interactions.

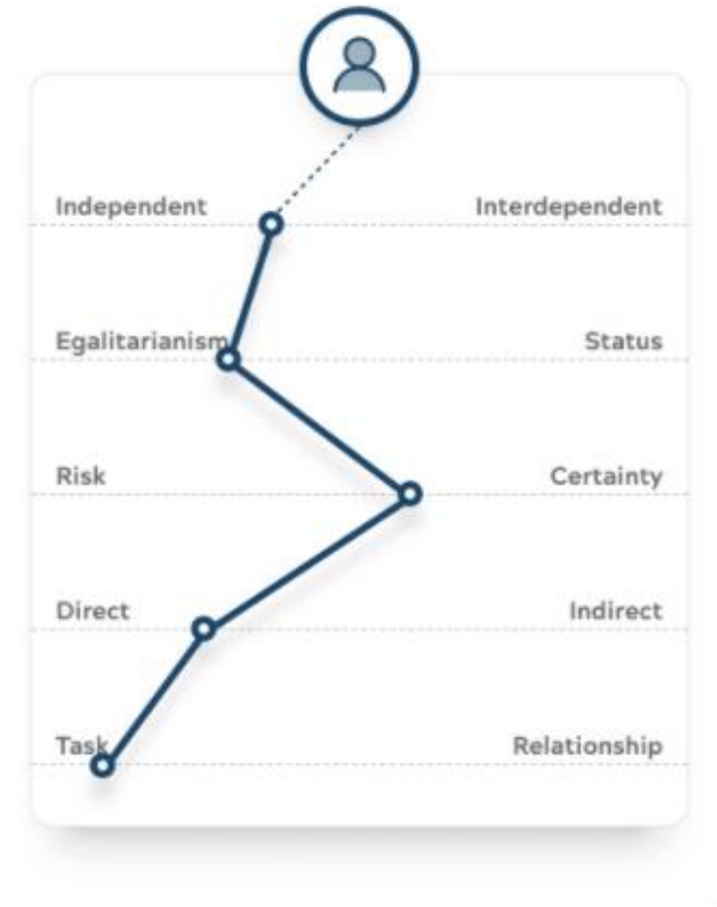
For this **Application Exercise**, we want you to use the Versatility App to:

- Find your style's strength and identify two that you feel are most like you.
- Identify one caution about your style that you feel you need to pay most attention to.

Describe one or two strengths from the Versatility App that you feel fit you well.

Describe one caution that you feel you need to work on.

Globe Smart Reference



Notes:

Start/Stop/Continue

Start
Stop
Continue
Best Practices

Consultative Skills

Modify Your Behavior

Modify your Behavior: Overview

Identify

Identify the person's Social Style.
"She or he is . . ."

Reflect

Based on the person's Social Style, ***Reflect*** on and describe her or his expectations for interactions with you.
"So she or he needs . . ."

Modify

Decide how to ***Modify*** your behaviors to maximize your effectiveness.
"Therefore I will . . ."

Purpose

In this module, you will:

- Learn how to adapt the way you work with other people in order to meet their style expectations and preferences.

Process

During this module, you will:

- Define an approach to adapting your behaviors and understand its impact on Versatility.
- Describe various strategies for the Modify step of the Versatile Response.
- Apply the Modify step to improve your relationship with one of your co-workers.

Payoff

As a result of participating in this module, you will gain:

- The ability to create Modify strategies to use with people of different Social Styles.

Versatility is a Stretch!

The ability to adapt one's own behaviors to meet the concerns and expectations of others in order to create productive relationships

How to Stretch

The Modify step is the outward demonstration of versatility. When you modify your behaviors you are stretching beyond your comfort zone.

- Think about the way you need to *increase* your assertiveness or responsiveness.
  - Do you need to use more ask-assertive or more tell-assertive behaviors?
  - Do you need to use more task-responsive or people-responsive behaviors?
- Always modify one dimension at a time, either assertiveness or responsiveness.

Remember, when you modify your behavior you make a temporary adaptation of your own behaviors.

You do not become the other person's style.

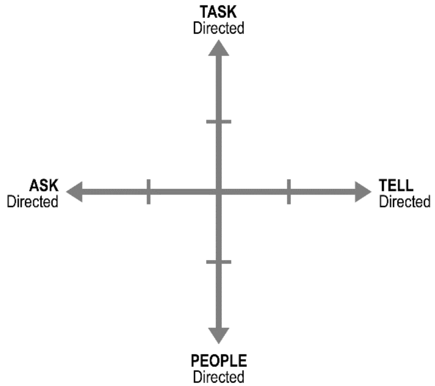
Stretching Beyond Your Comfort Zone

Increasing Task-Directed Responsiveness

- Talk about the task; emphasize facts.
- Demonstrate the logic behind your ideas.
- Acknowledge the person's concerns about the use of time.
- Use fewer gestures and facial expressions.
- Avoid small talk.

Increasing Ask-Directed Assertiveness

- Ask for the person's opinions first.
- Use a slower pace.
- Listen without interrupting.
- Pause more often.
- Ask for a commitment without pressure.



Increasing Tell-Directed Assertiveness

- Get to the point quickly.
- Volunteer information to the person.
- Be willing to express points of disagreement.
- Initiate conversation.
- Act quickly on decisions

Increasing People-Directed Responsiveness

- Verbalize your feelings.
- Pay personal compliments.
- Be willing to discuss personal experiences both at work and outside the workplace.
- Use more gestures and facial expressions.
- Vary your tone of voice.

***Remember:* When you practice stretching often enough, it becomes easier to do.**

Modify for a Purpose

Modifying your behavior is a purposeful activity. Always have a purpose or objective in mind when you prepare your Modify strategy.

Planning for the relationship

Examples of purpose statements:

- To develop more trust between LJ and me
- To clarify our expectations for how we will work together
- To resolve the outstanding issues between Terri and me
- To help Jorge accept me as a credible coach

Planning for a specific interaction

Examples of objective statements:

- Coaching for performance—to gain Jane's agreement to improve her presentation skills
- Negotiating a deadline—to get the project team to delay implementation by two weeks
- Influencing a decision—to gain my manager's agreement to assign me to the new project

Keep your purpose in mind

- When you are planning your Modify strategy
- When you are implementing your strategy

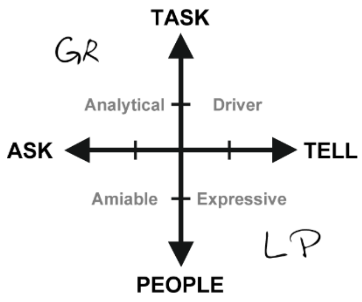
Example: Planning for the Relationship

IDENTIFY

- Write the person's name or initials in the appropriate quadrant (and/or record this information in the space provided below).
- Write your name or initials in the appropriate quadrant (and/or record your Social Style in the space provided below).

Other person's name and Social Style:

My Social Style:



PLANNING FOR THE RELATIONSHIP

PURPOSE

How would you like to improve this relationship? (Be as specific as possible.)

- *To get LP to trust me more*

REFLECT

In general, what interpersonal expectations does this person have of you?

- *Needs personal recognition for ideas and actions*
- *Wants to get to know me as a person*

MODIFY

In general, what can you do to improve your versatility in your relationship with this person?

- *Acknowledge LP's ideas and share my ideas*
- *Pay attention to LP's personal comments*
- *Volunteer information about myself*

Suggestions to Help You Modify

The following tips for helping you modify your style come from the successful experiences of some of Wilson Learning's past participants.

From Analyticals

To modify for Drivers, Michael suggests:

When I write an e-mail, letter, or memo, I write it the way I normally do, then invert it by putting the last paragraph or sentence first and the first last—put the recommendation/suggestion up front, followed by the analysis.

To modify for Drivers, Thomas suggests:

When I schedule a meeting with a Driver, I always arrive on time or early and plan on finishing early.

To modify for people-directed styles, Barb suggests:

When writing an e-mail, memo, or notes for a call, along with my spell-check I do a "style check" and make sure I started with a "how are you" or "hope you are well" phrase.

From Drivers

To modify for ask-assertive styles, Trey suggests:

During a conversation with an Amiable or an Analytical, I repeat to myself "One mouth, two ears. . . . One mouth, two ears" to remind me I need to listen twice as much as I talk with Amiables and Analyticals.

To modify for Analyticals, Steve suggests:

During a conversation with an Analytical, I will silently count to five. This seems to provide enough time to see if they are really done, or just thinking about what to say next.

Suggestions to Help You Modify

From Expressives

To modify to ask-assertive styles, Debbie suggests:

Before going into a meeting, I repeat to myself three times, "Don't interrupt, don't interrupt, don't interrupt." This helps me remember to give Amiables and Analyticals time to complete their thoughts.

To modify for Drivers, Peter suggests:

I think of golf! The Driver is the first big hit . . . you had better make it good and straight.

From Amiables

To modify for the different styles, Tony suggests:

When working with Drivers, I have learned to be more direct and voice my opinions before being asked for them.

When working with Analyticals, I have learned to keep my personal discussions to a minimum and not to ask too much personal information of the Analytical.

When working with Expressives, I have learned to mirror their enthusiasm and excitement for a project or idea.

When working with other Amiables, I have learned the value of revealing my personal information and asking the other Amiable for their personal information.

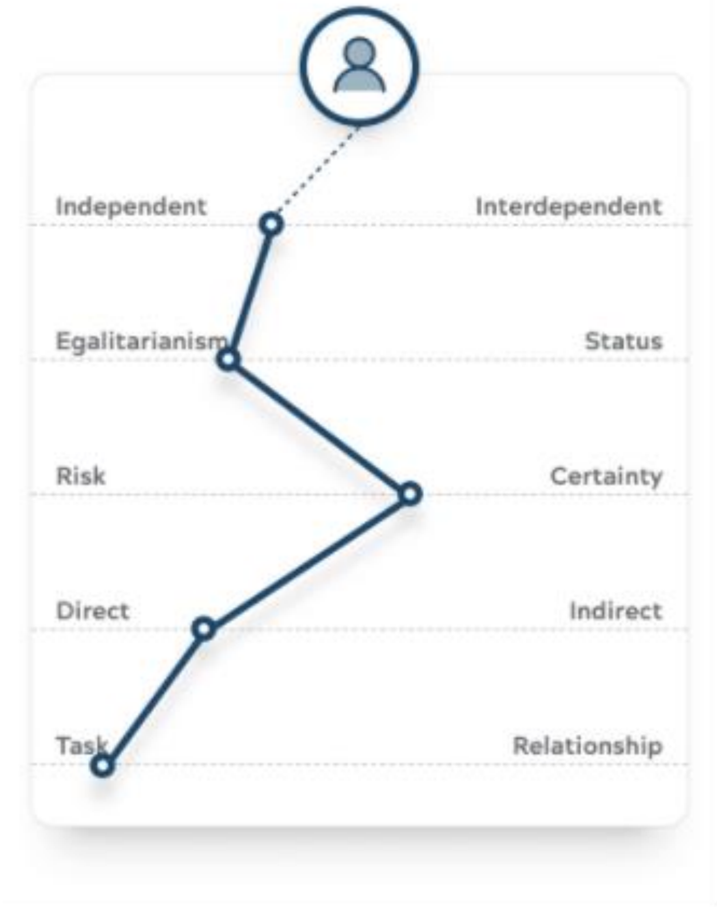
For All Styles

Paul suggests:

During a meeting, when I am asked a question, the first words out of my mouth are linked to style:

- *To Analyticals I say, "Good question. . . ."*
- *To Drivers I give a clear "Yes" or "No."*
- *To Expressives I say, "That is insightful."*
- *To Amiables I say, "Thanks for asking that question.".*

Globe Smart Reference



Notes:

Start/Stop/Continue

Start
Stop
Continue
Best Practices

Application Exercise: Modify Your Style

For this exercise you will choose a colleague from a different Social Style and use the Versatility App to plan your interaction with them.

For this **Application Exercise**:

- Choose a colleague with a different Social Style to your own, someone you would like to be more versatile with.
- Use the Versatility App to plan an effective strategy.
- Respond to the questions/statements below.

What is the colleague's Social Style?

Describe what you are already doing with this colleague that you feel is effective.

List one thing you want to stop doing when working with this colleague.

In general, what can you do to improve your versatility in your relationship with this person?

CONSULTATIVE SKILLS

PREWORK FOR THE CONSULTATIVE PROCESS

The Consultative Process: Prework Information

Objectives

As a result of participating in *The Consultative Process*, you will:

- Gain client trust more quickly.
- Link recommendations more effectively with critical client needs.
- Retain and grow more client business.

Content

The Consultative Process covers four key skill areas that, when combined, form the Wilson Learning Consultative Approach model:

- **Relating**
  Earning the client's confidence—and ultimately trust—by demonstrating the credibility to help problem-solve
- **Discovering**
  Truly understanding a client's needs, motives, and situation before discussing feasible solutions
- **Advocating**
  Presenting well thought-out solution recommendations linked directly to business strategy
- **Supporting**
  Maximizing the potential for client loyalty by enhancing the relationship through value creation before, during, and after implementation

The Consultative Process: Prework Information

To gain the full value from the next phase of the workshop sessions, you need to come prepared to work on some of your real clients in the consulting process.

Prepare

To prepare, choose clients in the following stages of the consulting process:

- Brand new—you are about to meet your Prime BU to discuss a new opportunity – with an existing or a new client.
- You have met your Prime BU/potential client, and you now need to discover their needs.
- You have met to discover the Prime BU/potential client's needs and now are ready to recommend a solution.
- The client has committed to the recommendation and you want to meet with them to reinforce the decision, facilitate a successful implementation, or ensure satisfaction.

During the upcoming program, you will use these on-the-job situations to plan, practice, and apply *The Consultative Process* principles. This will lead to improved performance and greater success in helping clients solve business problems.

Note these examples in the section on the next page and bring these to your session; you will need them!

Prework Notes

Brand new—you are about to meet your Prime BU to discuss a new opportunity – with an existing or a new client.
You have met your Prime BU/potential client, and you now need to discover their needs.
You have met to discover the Prime BU/potential client's needs and now are ready to recommend a solution.
The client has committed to the recommendation and you want to meet with them to reinforce the decision, facilitate a successful implementation, or ensure satisfaction.

CONSULTATIVE SKILLS

THE CONSULTATIVE APPROACH

The Consultative Process: Course Overview

Purpose

The purpose of *The Consultative Process* is to help you:

- Refocus your sense of purpose as a consultant.
- Develop and apply a consultative approach and process in your everyday work with clients.
- Through exercises of practice and application, learn how to meet your most challenging consulting situations.

Process

During these interactive modules that involve large- and small-group activity, you will:

- Explore the dynamics of the client/consultant relationship.
- Experience and define significant barriers to effective consulting.
- Learn techniques for avoiding and responding to the barriers.
- Practice the techniques in typical client scenarios.
- Plan for application with real clients.

Payoff

As a result of participating in *The Consultative Process,* you will:

- More effectively move clients toward their desired outcome.
- Develop ongoing relationships that result in continuous improvements and referrals.

The Consultative Approach: Overview

Purpose

The purpose of this module is to introduce the consultative philosophy and the four phases of the process.

In this module, you will learn to:

- Approach clients with a problem-solving attitude.
- Describe the four phases of the Consultative Process.
- Become aware of how the Consultative Process can increase one's competence.

Process

The learning process requires your active participation. You will be asked to contribute to large- and small-group discussions, complete individual exercises, and take part in case study situations. You will be asked to talk about how the skills in this program will apply to your own experiences with clients.

Payoff

The payoff includes skills that allow you to:

- More effectively move clients toward their desired outcome.
- Develop ongoing relationships that result in repeat business and referrals.

Notes:

Consulting Balance

The Back Wheel

Focus on and appeal to the TECHNICAL and BUSINESS issues in the consulting relationship.

The Front Wheel

Focus on and appeal to the INTERPERSONAL and POLITICAL issues in the consulting relationship.

Balance

Consulting Balance = TASK STRENGTH + PEOPLE SKILLS

Notes:

Problem-Solving Attitude

The client-focused consultant has a problem-solving attitude. This attitude is a *win/win* approach to problem solving.

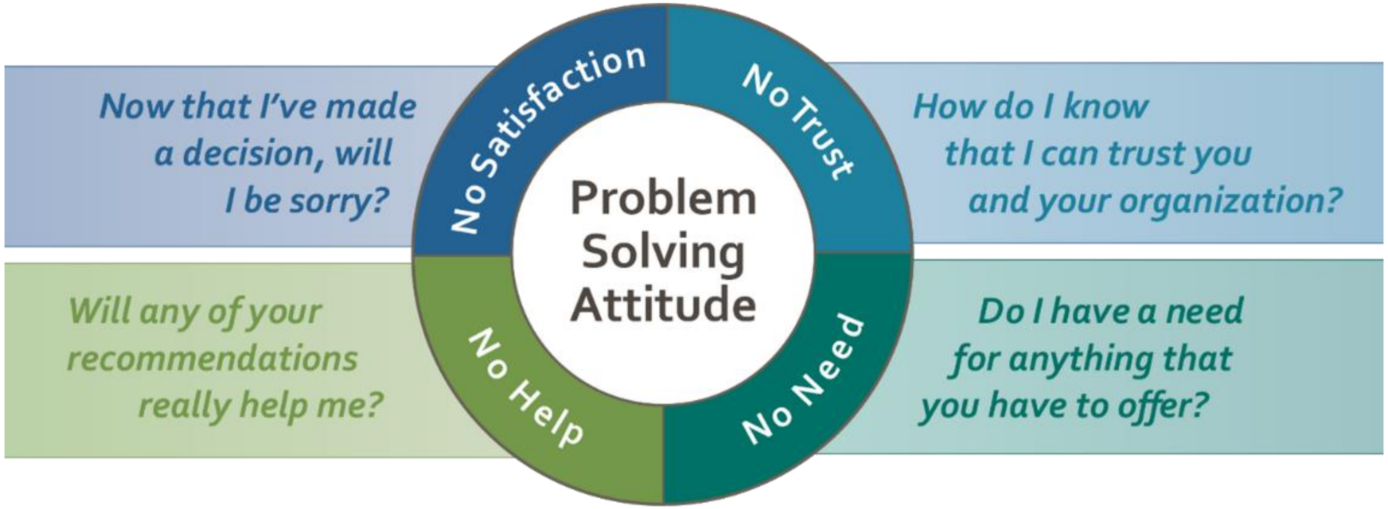
The consultant:

- Strives to understand and respond to client concerns
- Asks the client pertinent questions to discover needs
- Provides pertinent information about the solution
- Demonstrates honesty, empathy, and integrity
- Follows up consistently

The consultant provides expertise and advice that guides the client in improving performance, primarily through the analysis of existing business and operational problems and development of plans that will achieve the goals of the client.

Notes:

The Four No's



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Notes:

The Consultative Approach

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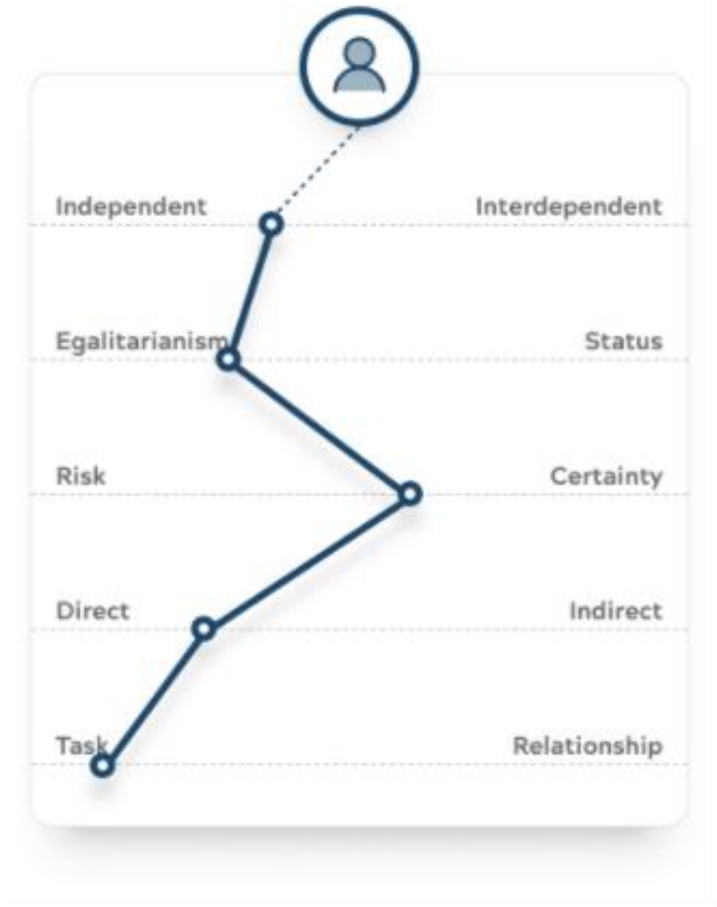
Notes:

Globe Smart Reference



Notes:

CONSULTING SKILLS

LEARNING AND APPLYING THE SKILLS OF RELATING

Relating: Overview

Purpose

The purpose of this module is to help you develop skills to overcome the barrier of the client's feeling of No Trust.

Process

During this module you will participate in the following learning experiences:

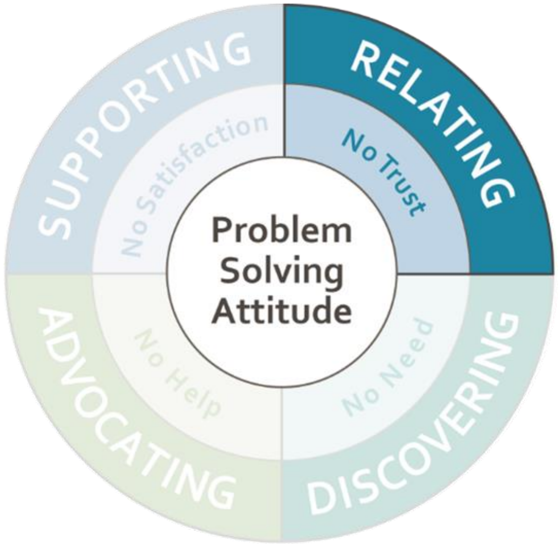
- ***Developing Awareness***
  Understand the barrier of No Trust.
- ***Learning the Skills***
  Learn critical Relating skills and techniques.
- ***Modeling the Skills***
  Recognize how to reduce Relationship Tension by establishing credibility.
- ***Practicing the Skills***
  Practice Relating skills in a role-play situation.
- ***Applying the Skills***
  Plan to apply Relating skills with a real client.

Payoff

After completing this module, you will be able to recognize when clients are feeling No Trust, raise clients' comfort levels about doing business with you, and influence clients to more quickly share business information that will help you understand their needs.

Notes:

Relating: Avoiding No Trust



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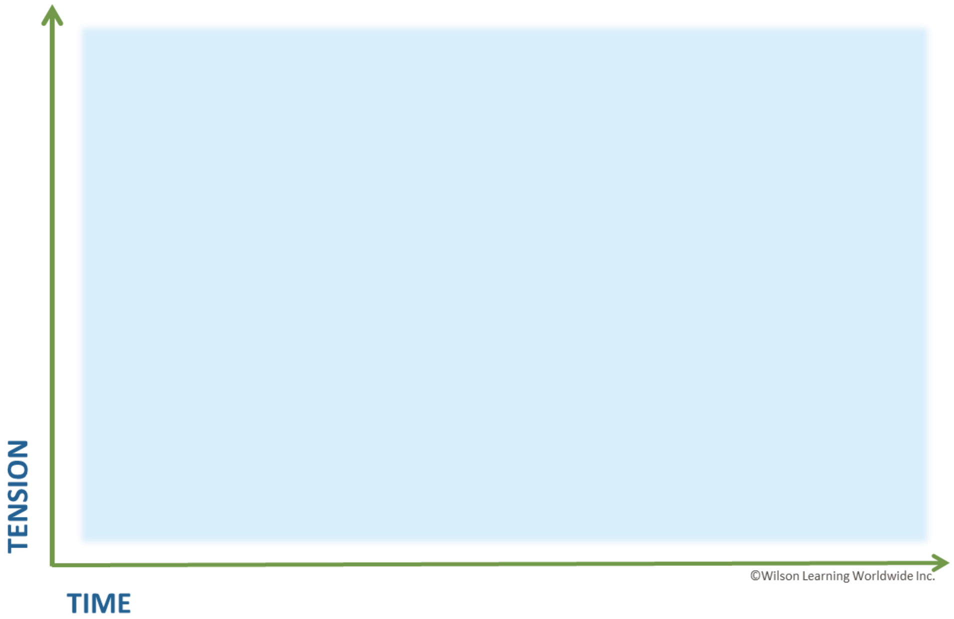
How do I know that I can trust you and your organization?

Notes:

The Challenge of Relating: Time and Tension



Relationship Tension

Relationship tension is the discomfort or insecurity people feel when a relationship is new or when there is difficulty in the relationship.

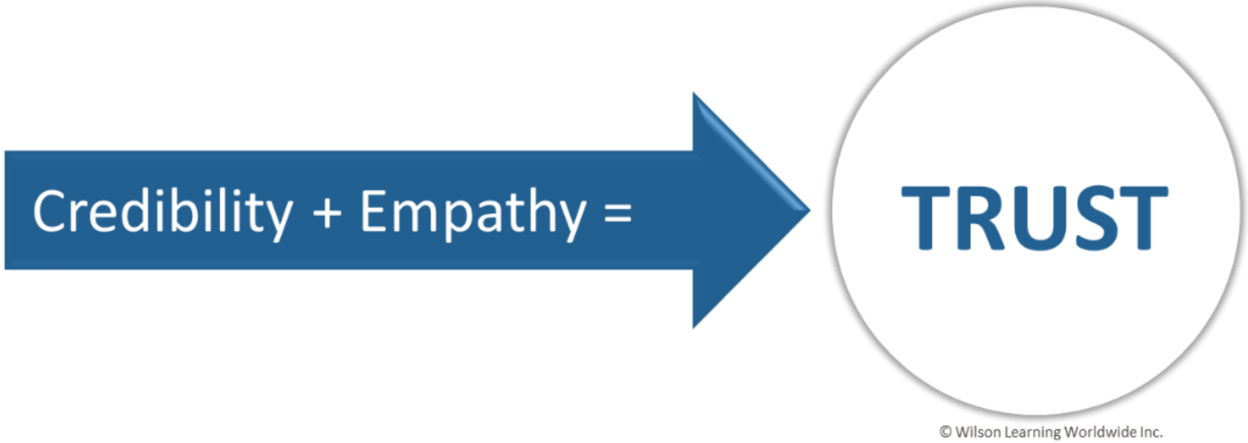
High Relationship Tension **Low Relationship Tension**

Task Tension

Task tension is the level of interest or urgency that a client feels about working with a consultant on a given problem.

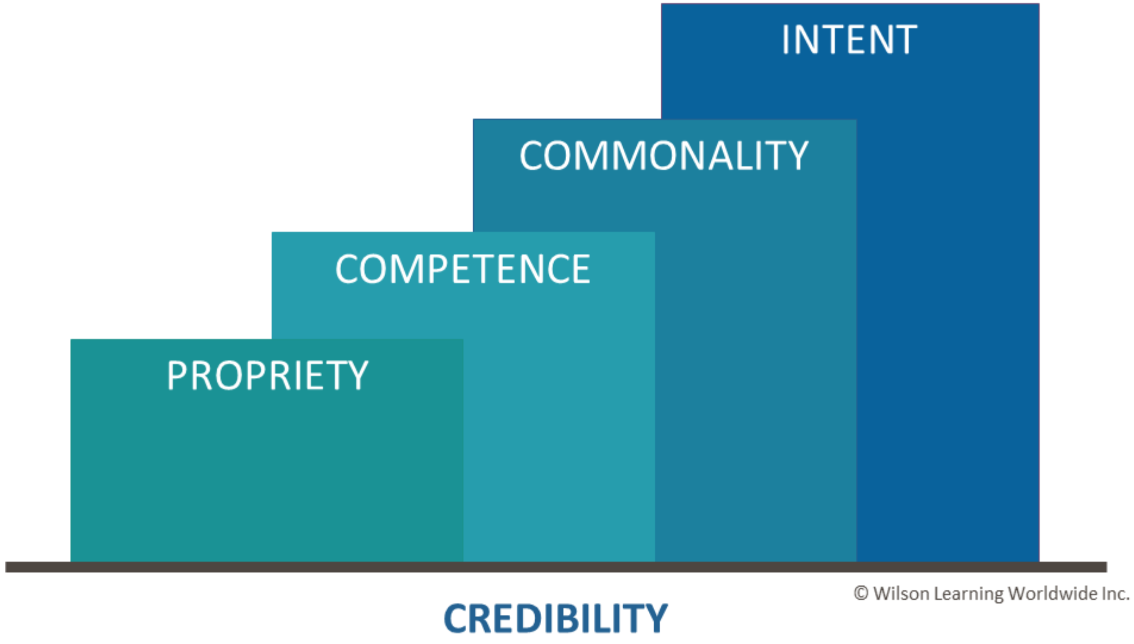
Low Task Tension **High Task Tension**

Trust Formula



Notes:

Demonstrate Credibility



Propriety

Propriety is the ability and willingness to meet the client's *external* expectations of business customs and behavior.

Competence

Competence is the perception that you have the capability and experience to help clients with their business problems.

Commonality

Commonality refers to the client's perception that you both hold things in common—interests, beliefs, and values.

Intent

Intent is an open declaration of your interest in the client's success and well being. Intent is associated with one's motives.

Notes:

Credibility

Propriety refers to meeting the client's expectations of appropriate business customs and behavior:

- Dress (looking the part)
- Manners
- Protocol (greetings, recognition of the client's status, punctuality, business card, handshake)
- Speech (use of appropriate language)

Common pitfalls in demonstrating Propriety include:

- The inappropriate use or overuse of jargon
- Prematurely addressing the client by their first name
- Oversensitivity to the client's gender

Competence refers to your ability to help the client solve business problems. Most clients are interested in:

- Information about you:
  - Your background, training, and education
  - Your skills and how you've applied them
  - Your track record
- Your knowledge of the client's situation:
  - Information you've heard or read from a reliable source
  - Your knowledge of similar clients
  - Educated guesses

Useful phrases for communicating Competence include:

- "My background is . . . ."
- "Here's what we did for . . . ."

Common pitfalls in demonstrating Competence include:

- Overselling your qualifications
- Pretending to know more than you actually do
- Relying too heavily on educated guesses because you have little or no information regarding the client's situation

Credibility

Commonality refers to finding areas of mutual interest, values, or experience. Establishing Commonality involves self-disclosure. To build commonality, ask questions or make open statements that search out and highlight common history, ideas, hopes, or ideals. One of the best ways to build Commonality is to mention a third party who may have referred you to the prospective client or with whom you have worked and you both know. That person's credibility with the client tends to be transferred to you, the consultant.

Phrases for establishing Commonality include:

- "Are you the person who . . . ?"
- "Do you happen to know . . . ?"
- "Many of my clients have similar concerns."

Common pitfalls in demonstrating Commonality include:

- Behaving in a patronizing manner
- Making assumptions about clients based on whom they know or what they do

Intent is perceived to be equated with one's motives. It is the client's perception of a consultant's interest in their benefit, or whether the consultant has a true problem-solving purpose in making the call.

Common pitfalls in demonstrating Intent include:

- Appearing manipulative or as having a hidden agenda
- Reluctance to provide information about the weaknesses or negative aspects of your product or service

Demonstrate Intent: Purpose/Process/Payoff Statements

Purpose Statement

The Purpose statement answers the question, *"Why are we here?"*

- "The purpose of our meeting is to share understanding about this project's scope."

Process Statement

The Process statement answers the question, *"How will we proceed?"*

- "I thought we could do two things. First, explore questions you might have about me or my organization. Then, I'd like to ask you questions about your views on how to best manage new requests."

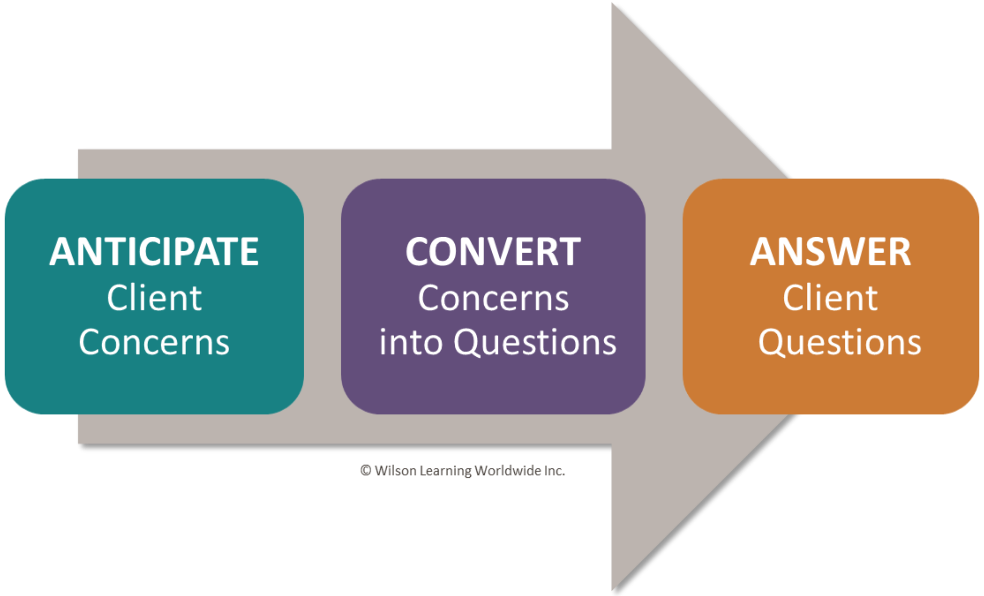
Payoff Statement

The Payoff statement answers the question, "What will be the outcome?"

- "As a result, we'll be able to anticipate issues that could affect the project scope and have an agreed-upon plan for addressing them."

Notes:

Demonstrate Empathy: The Ben Duffy Approach



Anticipate

Before a client meeting, ask yourself, "If I were my client, what concerns might I have about this upcoming meeting?" Make a list of the ***client's concerns*** and identify those that you believe would be most important to the client.

Convert

Convert the most important concerns into questions that you believe the client is most likely to ask.

Answer

Prepare ***answers*** to the most important client questions.

Notes:

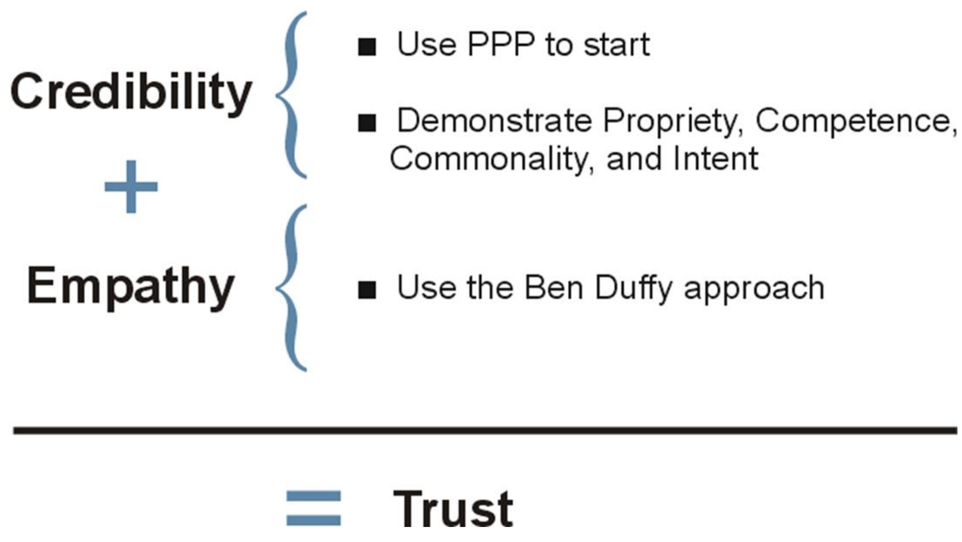
Client Concerns/Ben Duffy Questions

Concern	Question
Time	Will we take too much of your time?
Competence	Do we have the experience to handle the work?
Authority	Do we have enough seniority to get things done?
Propriety	Do we understand your environment?
Commonality	Who else have we worked with?
Agenda	Are we going to be open to your needs?
Intent	How will we help you over the long run?
Responsiveness	Will you get fast responses from us?
Follow through	Can you trust us to get the job done?
Workflow	How do we, as consultants, work with our clients?

- What important concerns might your clients have later in the engagement?

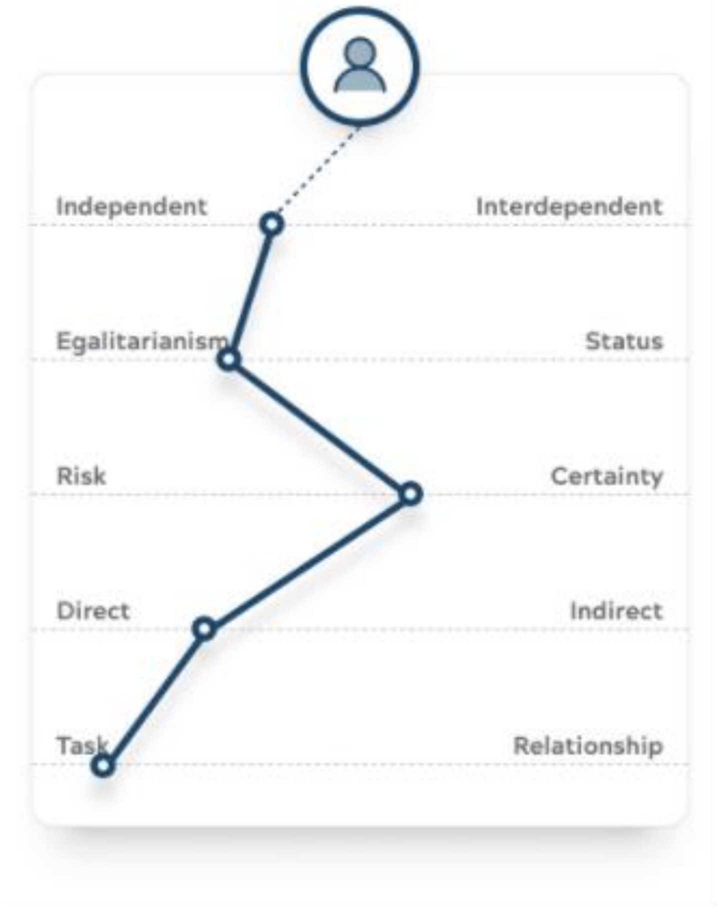
Notes:

Relating Summary



Notes:

Globe Smart Reference



Notes:

Start/Stop/Continue

Start
Stop
Continue
Best Practices

Application Exercise: Credibility

PPP (Purpose/Process/Payoff) statements are key to establishing empathy and credibility early in a consulting call.

For this **Application Exercise**:

- Pick an upcoming conversation in which you need to establish Credibility. List the things you will do to build Credibility.
- Give specific examples in each category record your responses below.

Examples of how I show Propriety:	Examples of how I show Competence:
Examples of how I show Commonality:	**Examples of how I show Intent:**

Application Exercise: Purpose, Process, Payoff

PPP (Purpose/Process/Payoff) statements are key to establishing empathy and credibility early in a consulting call.

For this **Application Exercise**:

- Provide a PPP statement for an upcoming or previous call.

Purpose:

Process:

Payoff:

CONSULTING SKILLS

LEARNING AND APPLYING THE SKILLS OF DISCOVERING

Discovering: Overview

Purpose

The purpose of this module is to help you develop skills to overcome the barrier of the client's feeling of No Need.

Process

During this module you will participate in the following learning experiences:

- *Developing Awareness*
  Understand the barrier of No Need.

- *Learning the Skills*
  Learn an approach and skills for accurately defining clients' needs

- *Practicing the Skills*
  In a role-play situation, use questioning skills and a Discovery Agreement to understand a client's problem.

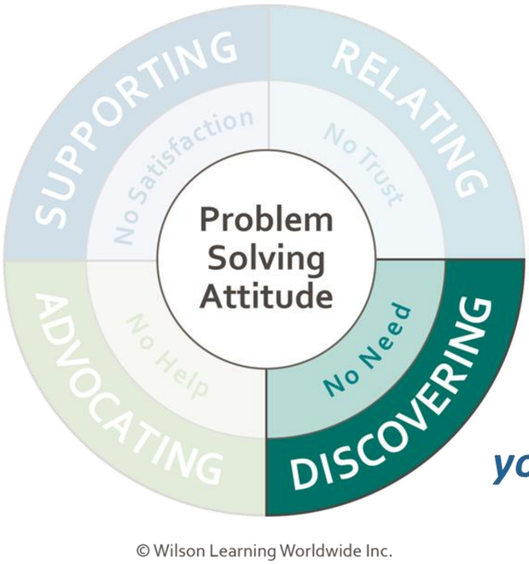
- *Applying the Skills*
  Plan to apply Discovering skills with a real client.

Payoff

After completing this module, you will be able to recognize when clients are feeling No Need, know how to gain a thorough understanding of what clients want, and appear to your clients as a competent and credible resource who understands their situation well enough to recommend an appropriate solution.

Notes:

Discovering: Avoiding No Need



Do I have a need for anything that you have to offer?

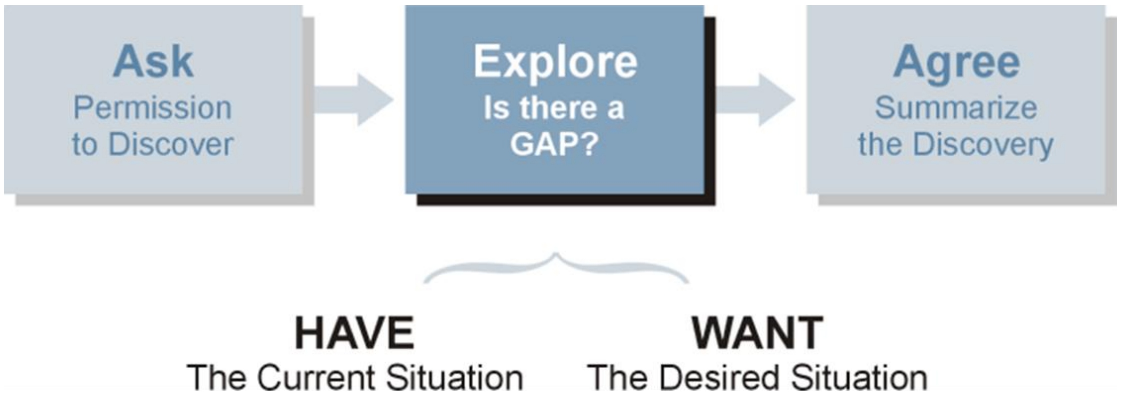
Notes:

The Challenge of Discovering: The GAP

History, mission, values	Business drivers, challenges	Desired results
Business drivers, challenges	Alternative solutions	Desired changes, improvement
Constraints, problems,	Competing interests	Desired advantages, gain
Causes, impact, consequences	Budget/financial issues	Desired level of satisfaction
Level of satisfaction	Decision roles, conditions	Desired business goals
Decision roles and conditions	Motives	Desired personal aspirations
Decision motives		

Notes:

Discovery Protocol



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"Search for all the things that prevent the client from having what he or she wants."

Notes:

Discovery Questions: The Basics 1

Closed (Confirming) Questions

Closed (confirming) questions can be answered with “yes” or “no.”

Closed questions get specific information quickly and are useful when you want the client to make a choice or when you want to direct the conversation. For example:

- “Have you ever encountered a project that was completed on time and within budget?”
- “Does your boss need to review this?”

Open (Exploratory) Questions

Open (exploratory) questions allow the client to respond in any way he or she chooses.

This form of questioning is useful when you want the client to respond freely, start a conversation, or expand on prior information. For example:

- “How are those applications performing so far?”
- “How long have you been in this position?”

Notes:

Discovery Questions: The Basics 2

Permission

Permission questions demonstrate empathy for any relationship tension the client may be feeling and reassure the client of your positive intent. For example:

- "I'd like to better understand your business goals and your situation. Would it be all right if I asked you a few questions?"
- "Different clients approach this problem in different ways. Could I ask you some specific questions about your approach?"

Fact-finding

Fact-finding questions are targeted at objective, verifiable data—such as who, what, when, where, and how much. Fact-finding questions are intended to gather information about the client's Current Situation. Typical client responses to fact-finding questions are "yes," "no," or a specific number or date. For example:

- "What application are you presently running?"
- "What kinds of alerts have you been getting?"
- "How often does that happen?"

Feeling-finding

Feeling-finding questions ask for subjective information that gets at the client's opinions, thoughts, feelings, values, and beliefs. Feeling-finding questions are intended to help you understand a client's Desired Situation and often contain words like *think* or *feel.* Feeling-finding questions are especially powerful when combined with fact-finding questions. For example:

- "How do you feel about the overall effectiveness of your current applications?"
- "In your opinion, what has been creating these false alerts?"
- "What are your thoughts about trying a slightly different approach?"

Notes:

Discovery Questions: The Basics 3

Best/least

Best/least questions are a type of feeling-finding question that helps you understand the potential opportunities in the client's situation. For example:

- "What do you like best about your current process?"
- "What do you like least about it?"

Magic wand

Magic wand questions (also known as crystal ball questions) are a type of feeling-finding question that encourages the client to dream a little by removing the obstacles from their mind—if only for a moment. For example:

- "What would it be like if you didn't have this problem or concern?"
- "What advantage would you gain if the process worked perfectly?"

Third-party

Third-party questions are a type of feeling-finding question that helps uncover a client's thoughts in an indirect manner. For example:

- "Some managers have found this expanded dashboard to be very effective. Do you agree with that perspective?"

Tell-me-more

Sometimes you want to find out more about whatever the client is saying. In such situations, use tell-me-more questions to encourage the client to provide more detail. For example:

- "Tell me more."
- "Can you be more specific?"
- "Please elaborate on that."

Discovery Questions: The Basics 3

Checking

Checking questions are used throughout the engagement to find out whether your understanding of the client's situation is accurate. Checking questions often follow a restatement. For example:

- "Is it fair to assume that you really need . . . ?"
- "Did you say you've been experiencing . . . ?"
- "So reducing system failures is important, but even more important is broadening its capacity to support more robust business analysis. Is that right?"

Catch-all

A catch-all question is a feeling-finding question that invites the client to supply additional information on any relevant topic. For example:

- "What else should I ask you about . . . ?"
- "What else should we discuss?"
- "If you were me, what else would you want to know about?"

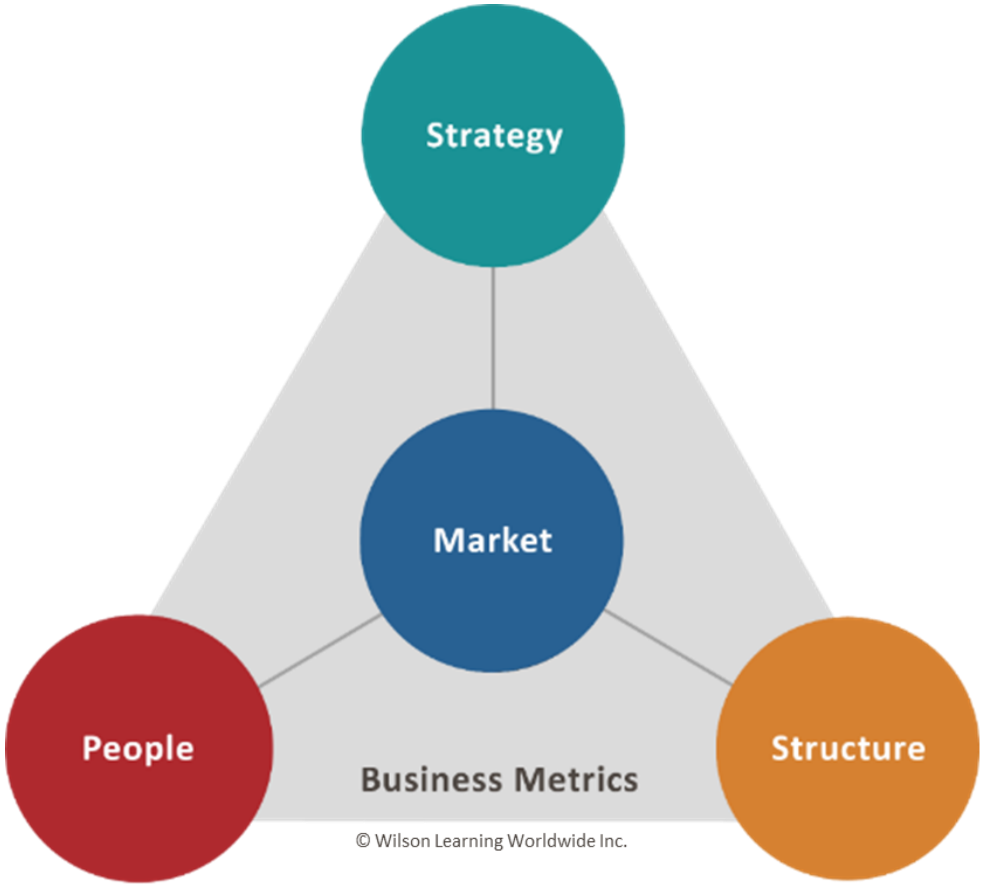
Notes:

Paired Fact-Finding and Feeling-Finding Questions

Fact-Finding Questions	Feeling-Finding Questions
What system are you currently running on?	What do think of its effectiveness?
Have users complained about difficulties in using the application? If so, what are the complaints?	What are your concerns about the difficulties they encounter?
How is the testing done now?	What do you think would be the easiest way to test?
How many calls does the help desk receive now?	What has caused that increase, in your opinion?
What's been budgeted?	How realistic does that seem to you?
What is the deadline for this project?	Does your boss think it is doable?
Who will be trained as admin for the application?	What will we need to do to be sure he/she is successful?
Have all of the users been trained on this new app?	How comfortable are they?
What satisfaction scores have your consultants typically achieved?	How well is that meeting your expectations?

Notes:

Business Needs Identification Model



Notes:

Task Motives

More Profit

The desire to increase net earnings

A profit motive is present in all organizations; however, it may not be the most important motive at a given point in time.

Less Cost

The desire to decrease or control the costs of doing business

Profit and cost are two distinctly different motives.

More Quality or Output

The desire to increase or maintain the volume of productivity and/or the quality of productivity

This motive is often described statistically; however, these factors may also be described subjectively—"Improve project output."

Less Effort

The desire to make work easier

This motive is often described as a change in the work process.

Identifying Task Motives

Identify the correct task motive for each of the statements below.

"We're spending too much energy testing the product." **Task Motive:**

"We're looking to increase our margin of performance by 5% in the next quarter." **Task Motive:**

"The cost of implementation is too high. We're bringing the wrong resources into the project much too early in the process." **Task Motive:**

"Our offerings are not competitive. The clients don't see the value in our proposals anymore." **Task Motive:**

"Activity levels are down. I'm not quite sure what our staff is doing with their time." **Task Motive:**

Notes:

Personal Motives

Power

The desire to gain greater control over some aspect of the situation

Approval

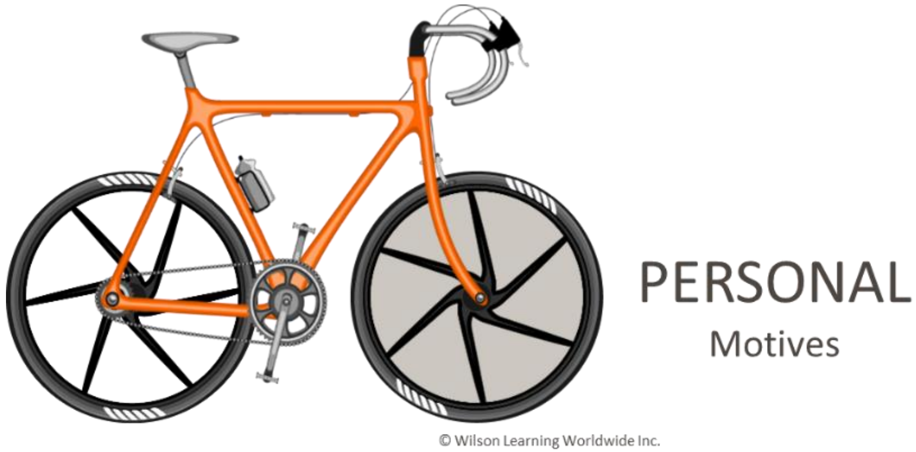
The desire to ensure that others affected by a decision will be pleased

Recognition

The desire to lead, to be unique, to be more visible or innovative

Respect

The desire to be acknowledged for expertise



- Power
- Approval
- Recognition
- Respect

Identifying Personal Motives

Identify the correct personal motive for each of the statements below.

"It's important everyone is in agreement with any changes we propose." **Personal Motive:**

"We need to be leading-edge on this—to be seen as the best in the marketplace." **Personal Motive:**

"The current system doesn't give me the control I want over the operation." **Personal Motive:**

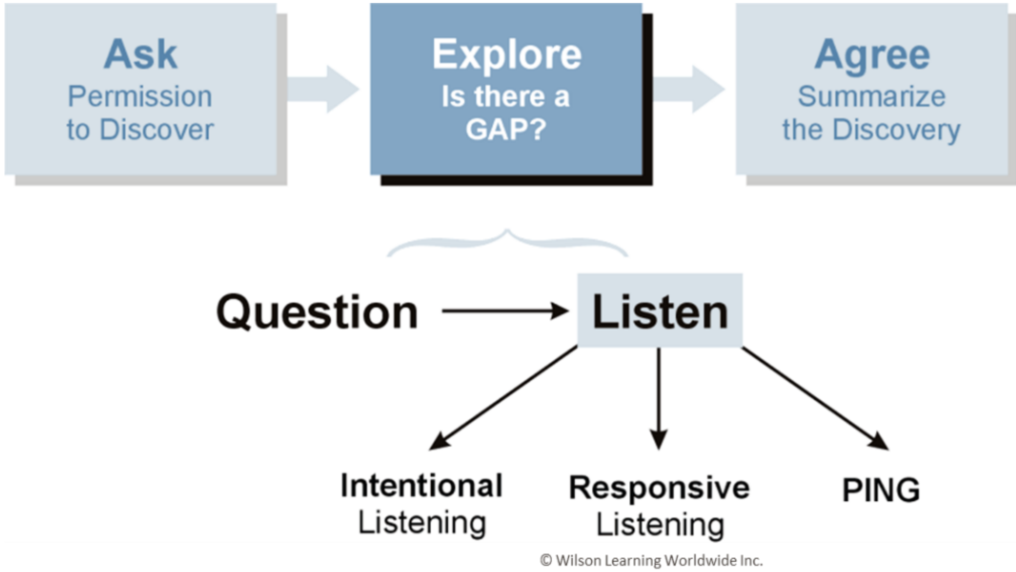
"Anything we decide needs to have a proven track record. We need to show the value of this and have clear logic and irrefutable evidence to do it." **Personal Motive:**

Notes:

Listing Skills

Intentional Listening

Intentional Listening is the act of listening for specific information.



Responsive Listening

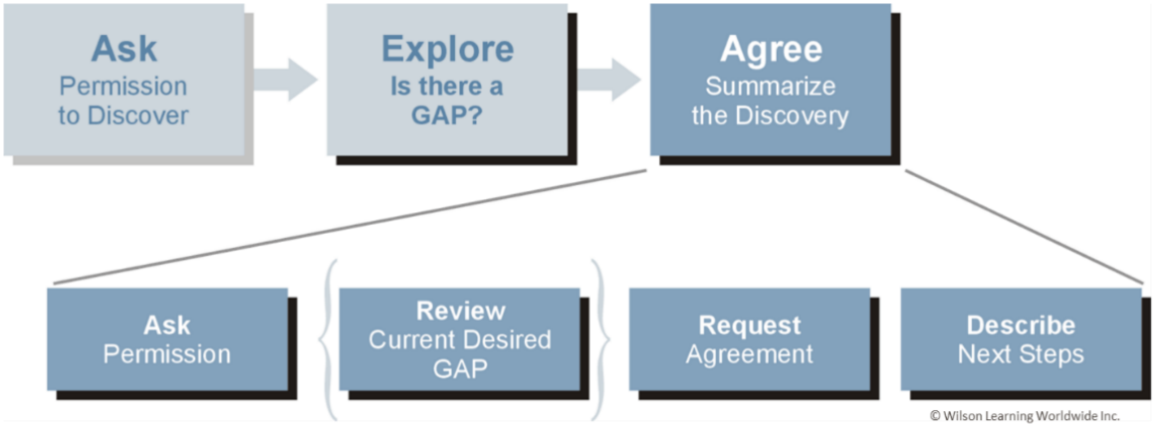
Responsive Listening is the act of encouraging the client to share more information by using words, sounds, and body language.

PINGs

PINGs are verbal or behavioral indicators that demonstrate that something is important to the client.

Notes:

The Discovery Agreement



The Discovery Agreement is a quick way to summarize what the client has told you and confirm your understanding. Using a Discovery Agreement involves four easy steps.

1. Ask Permission

Ask the client for permission to summarize your understanding of the information shared.

"Would it be all right if I recapped what we've discussed?"

2. Review the GAP

Review the client's Current Situation and any information provided about what he or she would like to have happen (Desired Situation). This step helps you confirm the GAP with the client.

"Currently, what is happening is . . . ."

"What you'd like to see happen is . . . ."

The Discovery Agreement

3. Request Agreement

In this step, you ask the client to confirm that your understanding is correct. If you ask for agreement and the client says, “No, that isn’t what I meant,” you have an opportunity to obtain clarity before making a recommendation.

“What additions or corrections would you make?”

4. Describe Next Steps

Explain the logical next steps that you and the client should take. This step makes a natural bridge into your suggestions, if needed.

“Given this information, I would suggest . . . . .”

Notes:

Written Discovery Agreement Model Format

Dear ,

[Personalize your introductory remarks to your prospective client. The last sentence of your remarks should be]:

I would like to clarify our discussion to this point to make sure that I understand your situation.

Current Status:

-
-
-

Desired Status:

-
-
-
-

Close with Request for Agreement:

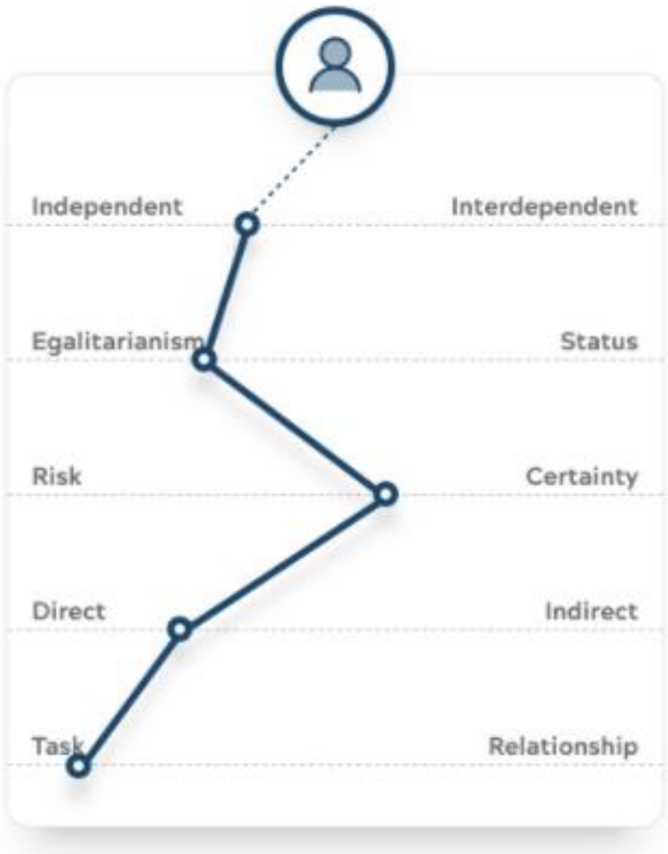
I hope I have captured the salient points of our discussion. Please make any additions or corrections. I'll call you early next week to confirm the accuracy of this letter.

Recommendation for Next Step:

Based upon the information you have given me, the next step . . .

Best regards,

Globe Smart Reference



Notes:

Start/Stop/Continue

Start
Stop
Continue
Best Practices

Application Exercise: Discovery Questions

In Discovery your intent is to *"Search for all the things that prevent the client from having what they want."* The key is to know what kind of questions will help you uncover needed information, and to use effective listening that shows you understand and encourage clients to share information.

Effective Discovery requires good Discovery questions.

For this **Application Exercise**:

- Think of two or three Discovery questions that you have found effective and record them below.

Discovery Questions:

Application Exercise: Listening

Listening is an underappreciated skill. Many of us believe it's best to say as much as we can as fast as we can. But the opposite is more often true. The more we let our clients speak and the better we listen, the greater our chances are of uncovering important information and making a commitment.

For this **Application Exercise**:

- Think about some recent client meetings and record below one or two ways you used your listening skills.

Listening Skills:

Application Exercise: Discovery Agreement

For this **Application Exercise**:

- Use the planner below to write a Discovery Agreement for a current client.

DISCOVERY AGREEMENT FORMAT	
Opening	*Dear ,* [Personalize your introductory remarks to the customer. Ensure that the introductory remarks make the intent of the Discovery Agreement clear.]
Current	*Current Situation:* • •
Desired	*Desired Situation:* • •
Define the GAP	*The challenges and barriers to the desired situation include:* • •
Request Agreement	*I hope I have captured the salient points of our discussion. Please make any additions, deletions, or corrections and forward the changes on to me.*
Next Steps	*Based upon the information you have given me, I think that the appropriate next step should be. . . .*

CONSULTATIVE SKILLS

LEARNING AND APPLYING THE SKILLS OF ADVOCATING

Advocating: Overview

Purpose

The purpose of this module is to help you develop skills to overcome the barrier of the client's feeling of No Help.

Process

During this module you will participate in the following learning experiences:

- *Developing Awareness*
  Understand and recognize the barrier of No Help.

- *Learning the Skills*
  Understand how to present recommendations in terms of Solution–Advantage–Benefit (S–A–B), use an assumptive attitude in asking for a commitment, and employ a technique for responding to client resistance.

- *Practicing the Skills*
  Practice Advocating skills in a role-play situation.

- *Applying the Skills*
  Plan to apply Advocating skills with a real client.

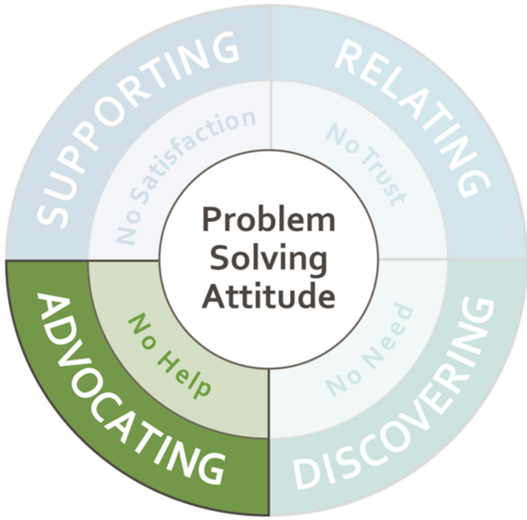
Payoff

After completing this module, you will be able to recognize when clients are feeling No Help; gain more commitment because clients understand how your solution helps them; and maintain stronger, more comfortable relationships with clients because you are able to demonstrate appreciation and understanding of their objections and concerns.

Notes:

Advocating: Avoiding No Help

Will any of your recommendations really help me?



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Notes:

The D–SAB-C Protocol

Discovery Agreement Summary

Review and highlight the important issues from the Discovery Agreement.

Solution Summary

Explain what you are recommending and describe how the recommendation will work.

Advantage Statements

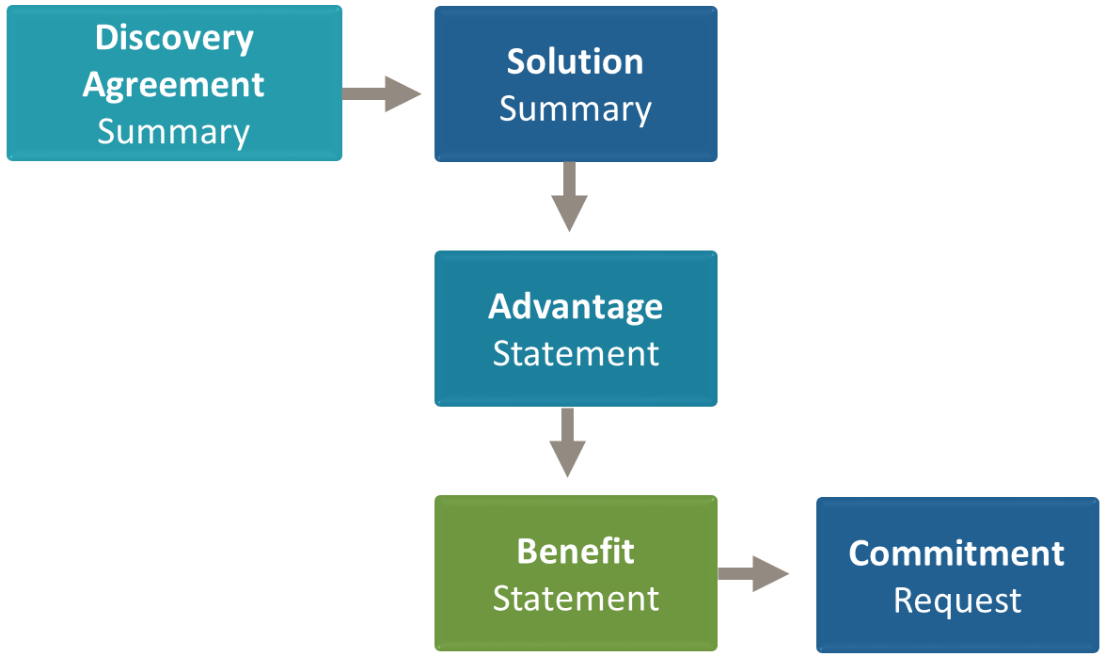
Describe how the recommendation will satisfy Task Motives.

Benefit Statements

Describe how the recommendation will satisfy Personal Motives.

Commitment Request

Ask the client to make a decision.



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Notes:

Advantage Statements

Appealing to a Profit Motive

Increased Profits

What it is: The desire to increase net earnings. Answers the question, "Will it help us make money?"

What to do: Explain how your solution or a feature of your solution will make money for the client.

Example:

"With this feature, the cost will remain flat, but you'll be able to raise your price to the market by three percent. That means this service will generate significantly more profit in the long run."

Appealing to a Cost Motive

Decreased Costs

What it is: The desire to decrease or control the costs of doing business. Answers the question, "Will it save money?"

What to do: Explain how your solution or a feature of your solution will decrease the cost of doing business for the client.

Example:

"This way, the replacement cycle for the system increases by three months. That will cut your operating costs significantly."

Notes:

Advantage Statements

Appealing to a Quality or Output Motive

Increased Quality or Output

What it is: The desire to increase or maintain the volume of productivity and/or the quality of productivity. Answers the question, "Will this improve productivity or quality?"

What to do: Explain how your solution or a feature of your solution will improve quality or productivity.

Example:

"The speeds and feeds for this unit are 20% higher than other machines in the industry. This means higher production for you without compromising quality."

Appealing to an Effort Motive

Decreased Effort

What it is: The desire to make work easier. Answers the question, "How well will this work for us?"

What to do: Explain how your solution or a feature of your solution will make the job easier to accomplish.

Example:

"The self-repair feature in the system reduces the troubleshooting process from seven clicks to three. And, the tracking screen eliminates the need for your operators to switch between functions to find out where they are in the process."

Notes:

Benefit Statements

Appealing to a Power Motive

Power

What it is: The desire to gain greater control over some aspect of the situation

What to do: Explain how your solution or a feature of your solution provides options, control, and/or enhanced decision-making capability.

Example:

"You'll be able to track the progress of production through all its operations and, with the click of the mouse, you'll be able to stop or redirect the flow of materials."

Appealing to an Approval Motive

Approval

What it is: The desire to ensure that others affected by a decision will be pleased

What to do: Explain how your solution or a feature of your solution will minimize risk of conflict and/or be met with acceptance.

Example:

"The service component of the offering guarantees availability 24 hours a day, 7 days a week. No one in your operation will be without support for longer than it takes to make a call or log onto our Web site."

Notes:

Benefit Statements

Appealing to a Recognition Motive

Recognition

What it is: The desire to lead, to be unique, to be more visible or innovative

What to do: Explain how your solution or a feature of your solution is unique, new, or state-of-the-art. Describe how it will be visible and demonstrate leadership in the field.

Example:

"You will be piloting the system in the company. It represents the next critical movement forward in the marketplace. With the system, you'll be able to provide benefits to both your clients and your company that are unique in this marketplace."

Appealing to a Respect Motive

Respect

What it is: The desire to be acknowledged for expertise

What to do: Explain how your solution or a feature of your solution is logical, based on current research, tested, and stable.

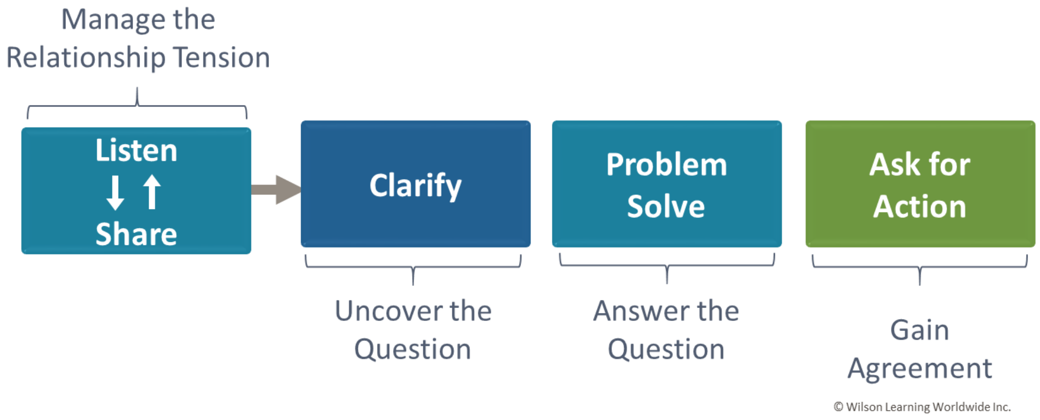
Example:

"The operating system has been tested thoroughly through our Alpha and Beta implementation program. The data suggest a mean time between failures that is 40% greater than other systems. And our plan to phase in the system will provide minimum disruption to the operation."

Notes:

Processing Resistance: LSCPA

Listen and Share



Clarify

Problem Solve

Ask for Action

Notes:

Gain Agreement

Assumptive Attitude

The Assumptive Attitude doesn't focus on "if" the client will agree; it focuses on "how," based on using LSCPA to understand the client's concerns and problem-solving to find a solution.

Options Agreement

The Option Agreement asks the client to select from a number of options presented in the recommendation. For example:

- "It feels like you could either use the mid-tier approach or you could develop a serviceable solution by combining some of the components. Which do you feel is most suitable?"

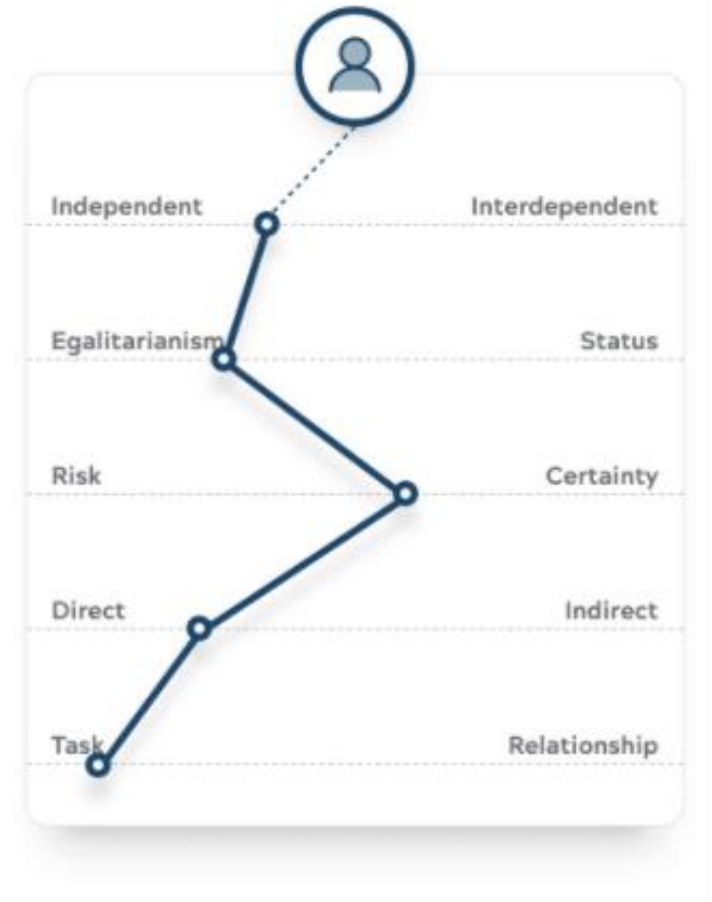
Natural Next Step

In the Natural Next Step, you ask the client what he or she would like to do next. For example:

- "It sounds like you agree that there's a strong link between what we've described and the issues we agreed upon earlier. And we seem to have addressed your concerns. Shall we plan the next step?"

Notes:

Globe Smart Reference



Notes:

Start/Stop/Continue

Start
Stop
Continue
Best Practices

Application Exercise: Solution-Advantage-Benefit (SAB)

The D-SAB-C Protocol is the best way to assure that your clients remain engaged and see the connection to the needs and motives you discovered.

For this **Application Exercise**:

Show how well you can present the value of your solutions!

- Pick a recent or upcoming Advocating conversation.
- Write a S-A-B Statement. Make sure you reference the key points you made in your Discovery Agreement.

In the Natural Next Step, you ask the client what he or she would like to do next. For example:

- "It sounds like you agree that there's a strong link between what we've described and the issues we agreed upon earlier. And we seem to have addressed your concerns. Shall we plan the next step?"

S-A-B Statement:

Application Exercise: Listen-Share-Clarify-Problem Solve-Ask for Action (LSCPA)

All objections are questions in disguise. LSCPA is a model for how to address a client's buying objection.

- **Listen** - Carefully listen to what the client is saying. Encourage the client to discuss concerns.
- **Share** - Validate the client's feelings and defuse the tension by offering the client support and acceptance.
- **Clarify** - Confirm with the client that you understand the unanswered question behind the objection.
- **Problem Solve** - Move the process forward in a way that answers the client's question.
- **Ask for Action** - Ask the client to take the next step. Gain agreement that the objection has been resolved.

Consultants in the same organization often experience similar buying objections. For this **Application Exercise**:

- Think of a common objective you experience.

- Describe that objection and how you did or could have used LSCPA to address it.

Consultative Skills

Learning and Applying the Skills of Supporting

Supporting: Overview

Purpose

The purpose of this module is to help you develop skills to overcome the barrier of the client's feeling of No Satisfaction.

Process

During this module you will participate in the following learning experiences:

- *Introduction*
  Appreciate the different expectations clients and consultants have after a decision is made to implement a project.

- *Developing Awareness*
  Understand the barrier of No Satisfaction.

- *Learning and Practicing the Skills*
  Learn and practice an approach for ensuring the satisfaction of your client.

- *Applying the Skills*
  Plan to apply Supporting techniques with a real client.

- *Program Finale*
  Review the Consultative Approach.

Payoff

After completing this module, you will be able to recognize when clients are feeling No Satisfaction, raise the client's sense of satisfaction with you and your solutions, and experience increased client loyalty and enhanced client relationships.

Notes:

Supporting: Avoiding No Satisfaction

Now that I've made a decision, will I be sorry?

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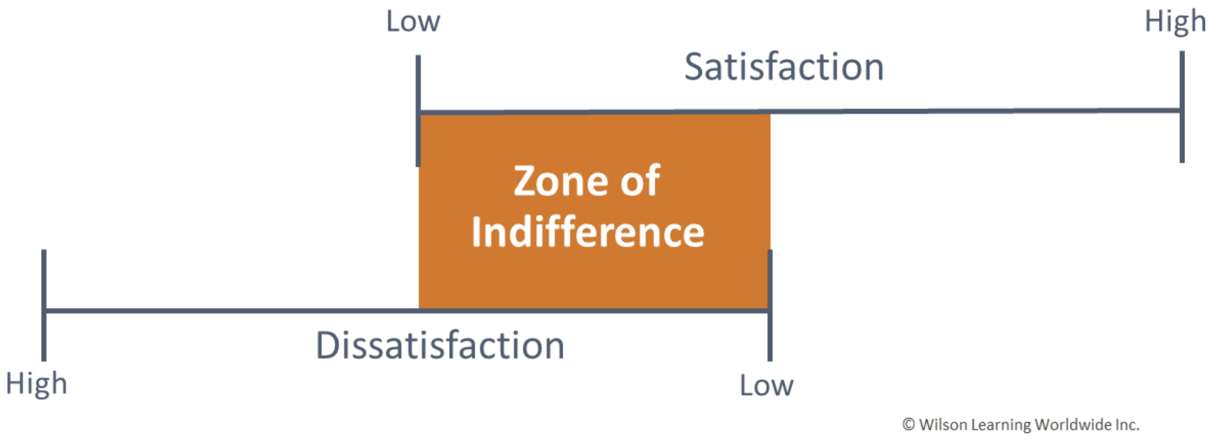
Notes:

The Challenge of Supporting: The Zone of Indifference

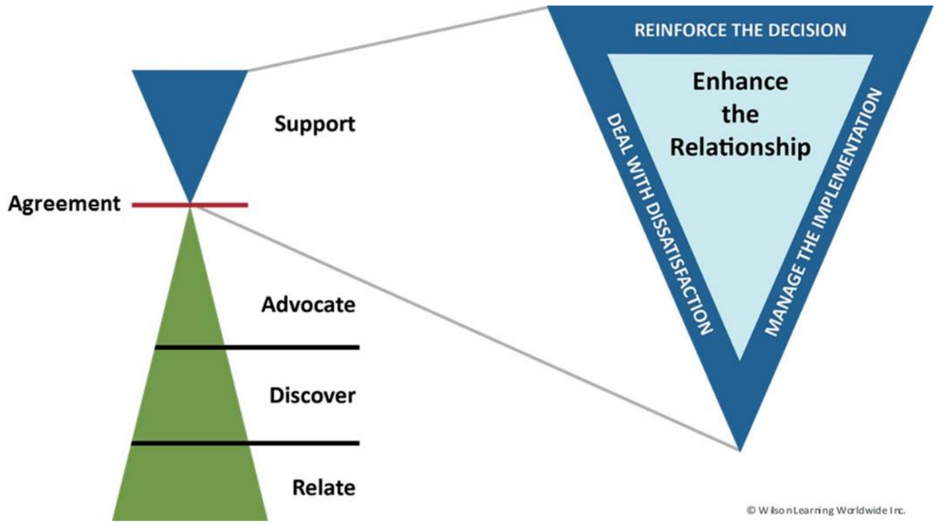


The Zone of Indifference

Once a client has agreed to the work, he or she has a set of expectations for the relationship. The concern at this stage is typically a feeling of "Did I make the correct decision? Will I be happy with the results?"

Notes:

Supporting



Enhance the Relationship

- Enhancing the relationship involves defining the requirements for ongoing satisfaction in the account for both you and the client.
- An enhanced relationship for the client provides them with a source of support for their purchase and a reliable resource for business issues that might arise in the future.
- An enhanced relationship for the consultant represents client loyalty and a source for repeat business.
- Enhancing the relationship is achieved by addressing the other three factors in ways that meet or exceed the defined requirements.

Notes:

Supporting

Reinforce the Business Decision

- Clients worry after making a significant business decision.
- Reinforcing the business or implementation decision reminds clients of the value they will receive as a result of implementing your solution.

Manage the Implementation

- Managing the implementation involves setting a goal to ensure that the start of the usage phase for your solution is successful.
- This factor requires hands-on attention from you to reassure the client that he or she made a good decision.

Deal with Dissatisfaction

- Dealing with dissatisfaction is an ultimate test for an organization.
- The future of the account often depends on what the consultant does to prevent things from going wrong or how the consultant responds when something does go wrong.

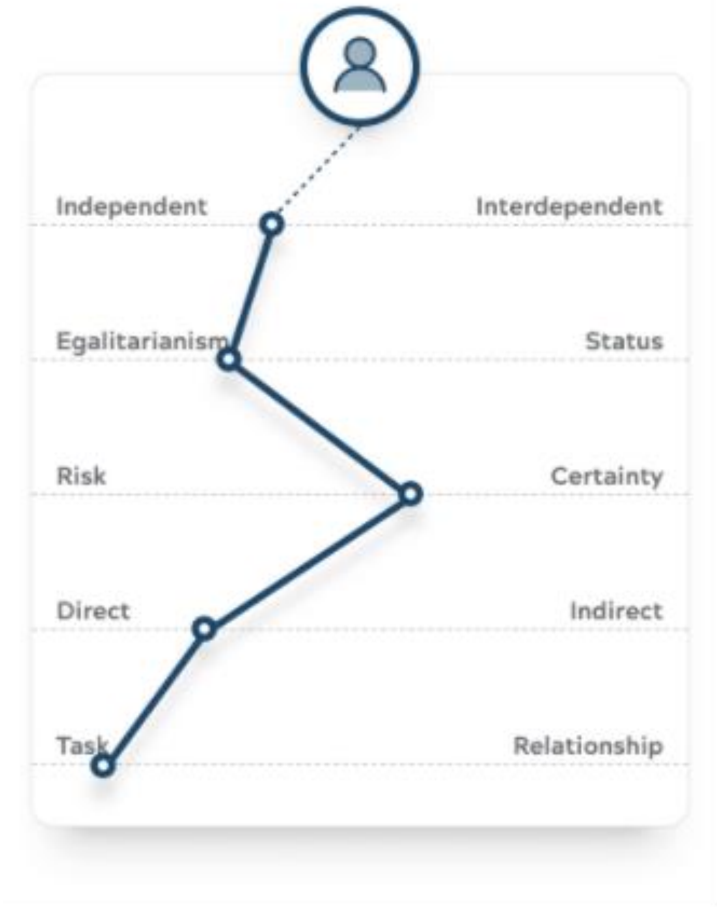
Notes:

Proactively Answer Four Questions

Enhance the Relationship	Reinforce the Decision	Manage the Implementation	Deal with Dissatisfaction
"How would you and the client define an enhanced relationship?"	"What might the client be concerned about immediately after the decision?"	"What must go right during the implementation to ensure client satisfaction?"	"What might go wrong as the client goes about using the solution?"
What must you do to make it happen?	*How can you minimize those concerns?*	*How can you ensure that the implementation goes smoothly?*	*How can you prevent anything from going wrong and what will you do if it does?*

Notes:

Globe Smart Reference



Notes:

Start/Stop/Continue

Start
Stop
Continue
Best Practices
Reflection
What would you like your clients to say about you?

Action Plan

The chart below contains specific actions I am willing to commit to during the next month for using the consultative skills I have learned:

(Be sure to include how you will move forward with your client situations explored in each module.)

Opportunity	Actions to Be Taken	By When?

Schedule a time when you and your Dialogue Partner will meet to follow up on your progress.

Date: Time:

My partner's contact information:

e-mail: phone:

e-mail: phone:

Application Exercise: Zone of Indifference

For this **Application Exercise**:

- Think of a client who you believe might be in the Zone of Indifference.
- Using the numbered scale below, total your responses and enter the number to indicate if your client is Dissatisfied, Satisfied, or in the Zone of Indifference. Your response should be between 4 and 20.
- Share your score and specific actions you feel you could take to enhance the relationship with your coach.

Zone of Indifference Rating Scale

Has my client	Strongly Disagree	Disagree	Neither	Agree	Strongly Agree
Expressed Satisfaction Directly	1	2	3	4	5
Shared information on positive reactions of others	1	2	3	4	5
Referred me and my company to others	1	2	3	4	5
Asked me to propose another project/solution	1	2	3	4	5

Total your responses and enter here (number will be between 4 and 20):

- If your total is between 4 and 8, then your client is more likely in the Dissatisfied zone.
- If your total is between 9 and 15, then your client is more likely in the Zone of Indifference.
- If you total is between 16 and 20, then your client is most likely in the Satisfied zone.

Application Exercise: Zone of Indifference

Actions to Create Satisfied Customers:

Describe the actions you could take to enhance the relationship.