

Workshop Preparation Kit
for the Workshop
“Power Skills For The Relationship Manager”

A Workshop Facilitated by
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Recommended Timeline For the Workshop

12 Weeks or More Before Your Workshop

Schedule and book the workshop with Lodestar. (12 weeks is the suggested minimum time to have a reasonable chance of getting the dates you want. On some occasions, it may be possible to book a workshop on a shorter time frame than this, but the earlier you contact Lodestar, the better are your chances of getting the date(s) you want.)

8 Weeks Prior to the Workshop

Notify your territory managers (TMs) of the coming workshop (if you have not already done so).

e-Mail out the invitation memo (a sample is included in this kit).

If you need to order audio-visual equipment, schedule it now. If you have it on hand, skip this step. Equipment needed: computer projector (VGA, SVGA, or XGA) and screen; flip chart with 1 full pad of paper.

If you decide to hold the workshop off-site, make arrangements for a meeting location. If you go off-site, remember to make arrangements for lunch or dinner (depending on when you decide to start your workshop) and early and late refreshment breaks.

2 Weeks Prior to the Workshop

Remind your TMs of the coming workshop.

(Optional: e-Mail the confirmation notice to all who will be attending. See the sample in this kit.)

1 Week Prior to the Workshop

Print any materials from the master material sent to you by Lodestar (if applicable).

1 Day Before the Workshop

- Make sure the room is set up per the attached room set-up diagram.
- Make sure the audio-visual equipment and flip chart are set up and ready to go.
- Make sure the lunch is set.
- Make sure the breaks are set up. You should have coffee/tea on hand when your guests arrive; donuts and fruit are optional. Plan on a mid-morning break (around 10:00 am; refresh the coffee; add soft drinks) and an afternoon break (around 2:30 pm; soft drinks).
- Designate a representative from your distributorship to be present to start the meeting with welcoming comments, etc. (This person is not required to stay beyond the kick-off speech.)

Day of the Workshop

- Make sure your welcomer will be present and has appropriate welcoming comments ready.
- One hour before the meeting starts, make sure the opening refreshments are out and ready and that the caterer is on schedule for the first and second breaks and meal.

1 Week After the Workshop

- You will be receiving the invoice from Lodestar for your workshop.

Workshop Description

Two action-packed days of activities and discussion geared towards helping field sales reps become more efficient and effective at covering their account bases profitably. One of our most popular workshops.

Who would best benefit by participating:

Field sales representatives (“territory managers”, “account managers”, “sales reps”, etc.) of all experience levels and market foci (residential or commercial); sales management personnel; TMs should bring a list of their accounts and the last three years of sales history by account

Deliverables:

Manual (120 pages), CD (Word and Excel files and templates)

What the Participants will do:

- ★ Discuss how changes in the HVAC business have forced them to change their skill sets
- ★ Do a time-use assessment and discuss its ramifications
- ★ Do a goals and life-balance assessment
- ★ Classify a list of sample contractors according to their growth stages
- ★ Segment their account list using a sophisticated computer-based technique and develop call strategies using this segmentation
- ★ Develop a call plan agenda
- ★ Participate in team-building activities and learn the principles of teamwork
- ★ Learn their conflict resolution mode and how to use it to defuse conflict, including role playing with the facilitator
- ★ Calculate how much shelf space they will need to reach a specific share of market goal in a given area

Workshop Objectives

1. Demonstrate understanding of how their bias (transactional or consultative) interacts with their customer's biases
2. Given a list of accounts, sort them for the most effective call pattern and develop call objectives for each.
3. Apply solid time management principles to increase daily effectiveness.
4. Classify a list of accounts according to where the accounts are in their growth cycles and tell how to approach each account.
5. State the benefits of team approaches to problem solving.
6. Demonstrate proficiency with conflict resolution and problem negotiation.
7. Create a dealer recruiting plan for a specific area and share target.

Workshop Logistics

TMs should bring the following:

- ★ Laptop computer (with Excel 2000 or later)
- ★ List of their accounts with purchase histories going back at least two years
- ★ Notebook or note paper
- ★ Pens or pencils
- ★ Pocket calculator
- ★ (Suggested: State highway map with their territory boundaries marked with a felt-tip marker)

Lodestar will provide the following:

- ★ Sign-in sheet
- ★ Name tent cards
- ★ CD-ROM for each TM and sales manager in attendance

Distributor should provide the following:

- ★ Workbook printed from the Adobe PDF file sent to them by Lodestar (120 pages; can be put into a 1/2 -inch 3-ring binder)

How To Sell It To Your TMs

Lodestar believes strongly in (and teaches) the use of SPIN[®] questions. Therefore, we recommend that this workshop be sold using a series of SPIN[®] questions. The following are offered as possible question sets to use. Feel free to use them or create your own.

Situation

How do you think you are doing at covering your territory?

Problem

Are you having any areas that give you trouble? Such as?

Implication

What are you doing about those areas? If you don't take action to handle them effectively, what do you think you have to look forward to in your sales career?

Needs Pay-off

If you could get some training that could help you handle those problem areas more effectively, what do you think that could do for your career?

Situation:

How are you doing with your account list this year?

Problem:

Are you having any difficulties with any of your accounts? What sort?

Implication:

If you don't change how you handle those problem accounts, what do you think you have to look forward to the rest of this year and next?

Needs Pay-off:

If you had the skills needed to resolve those account issues, what might that do for your happiness and sense of success as a TM?

Workshop Cost Estimating Sheet

Item	Quantity	Cost Ea	Net Cost		
Facilitation Fee (get quote from Lodestar)	1	\$7,000	\$7,000		
Travel expenses (estimated)	1	\$1,000	\$1,000		
Workbooks		\$	\$		
Arrival refreshments		\$	\$		
First break		\$	\$		
Meal		\$	\$		
Second break		\$	\$		
Audio-visual: VGA projector/screen	1	\$	\$		
Audio-visual: flip chart/pad	1	\$	\$		
Room rental	1	\$	\$		
Trinkets you may wish to give away		\$	\$		
Other:		\$	\$		
Total workshop costs					\$
Less Manufacturer Co-op approved					-\$
Total expected attendance					
Cost per attendee				\$	

Sample Invitation Letter

Feel free to copy this letter (from Acrobat reader, select the text and Copy it, then Paste it into your word processor document).

There is a story about a logging company that hired a man to cut down trees with a chainsaw. After his orientation training, the hireling was given a large chain saw and assigned to a crew. His production for the first day was above average for a new hire, and his crew was pleased to see it! His production for the second day was just average, and on the third day he began to fall off in the number of trees cut. With concern, his foreman approached him the morning of his fourth day and brought the performance to the new man's attention. "Boss, I am working as hard as I did the first day I got here. It's just that it seems that it is taking longer and longer to cut these trees," said the new man. The foreman said, "Let me see your saw." He ran his thumb along the chain and noted how dull it had become. "Well, here's your problem, boy," said the foreman. "Your chain has gotten dull. You've got to sharpen these every night." And he then proceeded to show the new man how to sharpen the chain. That day, the new man's production was equal to his first day's output, and it stayed high thereafter.

Sales is like cutting trees sometimes. We can get into the routine, at first doing well, but as time passes, finding ourselves becoming more and more frustrated with the daily grind. That's when it's time to sharpen our saws, for when our minds and hearts are sharp, our production is high.

We are going to give you an excellent chance to sharpen your saw in a few weeks. We have hired a company called Lodestar Consulting to come to our place and conduct a two-day workshop that can help put the edge back on our saws. Your attendance at this workshop is not only requested—it is required, because we believe very strongly that a team that gets regular sharpening is a more productive team, and we *all* reap the rewards of that!

Mark your calendars for [date]. To be ready for this workshop, you will need to bring your laptop computer, a pen or pencil, some note paper, a pocket calculator, and—most importantly—your account list, with purchase histories for the last two years if available. ([name] will be giving you computer printouts to help with this.)

I am looking forward to this time and I think you will appreciate the fact you participated too.

[Signed by sales manager or other appropriate executive]

Sample Confirmation Letter

Feel free to copy this letter (from Acrobat reader, select the text and Copy it, then Paste it into your word processor document).

Good day, sales team!

Just a reminder that you are confirmed to attend our upcoming workshop, “Power Skills for the Relationship Manager”, conducted by Lodestar Consulting, on [date] at [location].

Be sure you bring your laptop computer, a pocket calculator, a pen or pencil, some note paper, and your account list with the last two years of purchase histories.

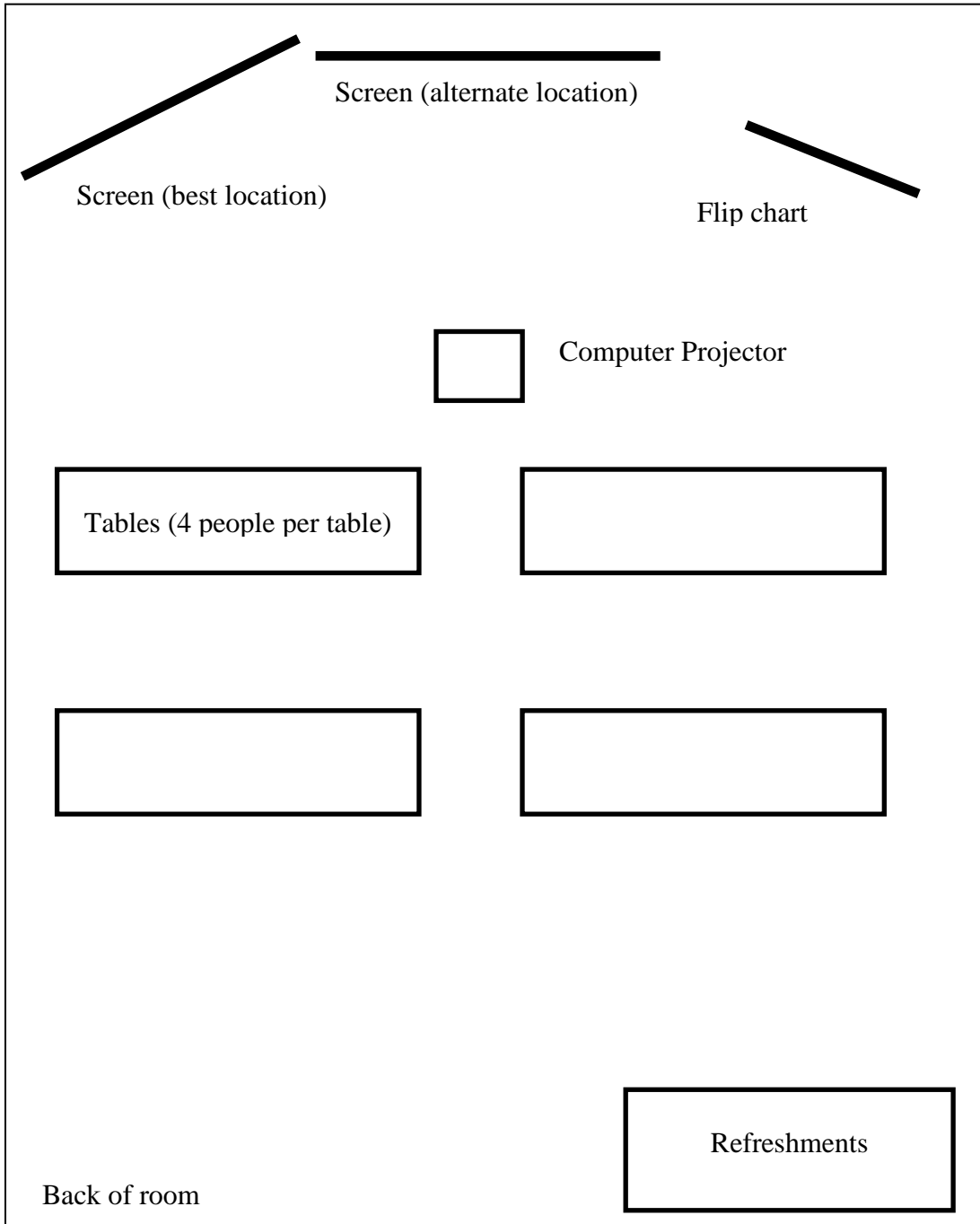
The meeting starts at 8:00 am sharp! We’ll have coffee and rolls ready for you.

See you on the [date].

[Sales manager or other appropriate executive signature]

Requested Room Layout

As much as possible, try to have the workshop room arranged along the following scheme:



If you will be using computers, please be sure to have adequate power arrangements set up.