

Workshop Preparation Kit

for the Workshop

“War College”

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.)

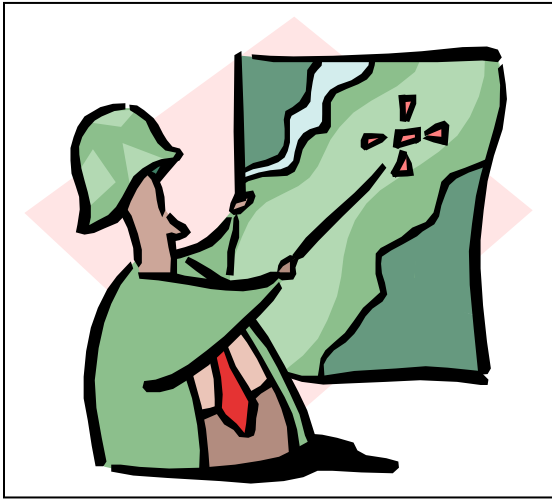
Day of the Workshop

- 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



Imagine a two-day workshop in which your territory managers (TMs) learn how to analyze their territories, set sales goals (in sales dollars, gross margin dollars, and share of market) and create detailed go-get plans that get them there. Then imagine them presenting their completed plans to you and the facilitator and then being required to defend their plans (if weak) and challenged to make them happen. Finally, imagine how it will feel when your sales team hits their goals next year and you capture significant market share from the Other Guys.

This is the focus of “The War College.”

If you want the traditional pasty course on recruiting, don’t call me for this workshop. This course **begins** where those pasty wannabes end. This is a target-rich, specific, and hard-hitting workshop for those who are serious about improving sales performance and taking market share away from the Other Guys.

Who would best benefit by participating:

Field sales representatives (“territory managers”, “account managers”, “sales reps”, etc.) of all experience levels focused on the residential market; sales management personnel

Deliverables:

CD-ROM with Lodestar’s *War College* software (Excel 2000 or later required)

What the Participants will learn and do:

- ★ How to describe their present territory
- ★ How to set sales goals that are realistic but challenging
- ★ How to determine how much of their goal can be reached by working with their existing accounts
- ★ How to build plans to secure the extra business from their existing accounts
- ★ How to determine how much of their goal must be reached by recruiting new accounts

- ★ How to identify and target new account prospects, and build detailed and concrete plans to convert these prospects
- ★ How to estimate how much of the goal each component (existing and new dealers) will contribute to the plan's success
- ★ How to roll up the entire process into one grand summary plan
- ★ How to present their plan to their sales manager, the facilitator, and their peers
- ★ How to monitor progress toward their plan as the year unfolds

On the morning of the first day, the TMs learn how to use the software. On the afternoon of the first day (and evening, if needed), they will use their own data to analyze their territories and build a war plan for the next year, with details fleshed out for the next 90 days.

On the second day, they will present their war plans to the group and be evaluated by the instructor and sales manager.

Sales managers should be prepared to give the TMs their sales goals for next year (if they don't already have them). They should also come to the workshop prepared to give either of two sets of data: the total number of residential split systems you sold last year (and their aggregate sales dollars), the same for gas furnaces, oil furnaces, and small package units (single-phase, single-chassis units, heating and cooling, five tons and smaller, suitable for residential use).

Alternatively, they could estimate the average sell price of each of these four types of unit and then the relative mix you sell.

(For a more detailed paper describing this workshop, contact Lodestar.)

Workshop Objectives

1. Understand the full potential of your territory and identify where your territory is strong and where it needs to be strengthened.
2. Understand your dealer base, knowing the status of each dealer (growing, shrinking, static), and the approximate share of wallet (percentage of their purchases) each dealer is giving you
3. Clearly state your sales goals in terms of percentages, dollars, dealers and units sold.
4. Sort your dealer list using a sophisticated sorting algorithm and using that sort to determine which dealers to spend extra time with in growing business; then identifying specific strategies to use for each dealer to achieve the planned growth.
5. Identify where you need to add dealers; know how to find dealers in the areas where coverage is weak.
6. Select the best prospects for conversion in a given area and develop a detailed plan of attack that runs 90 days out.
7. Track your progress month by month to see if you are on track to make your plan, and if not, what you may need to do in the time remaining to get back on track.

Workshop Logistics

TMs should bring the following:

- ★ Notebook or note paper
- ★ Pens or pencils
- ★ Laptop computer with CD-ROM bay and Excel 2000 (or later)

Lodestar will provide the following:

- ★ Sign-in sheet
- ★ Name tent cards
- ★ CD-ROM with Lodestar's *War College* software
- ★ Worksheets and forms
- ★ A month prior to the workshop, Lodestar will email the distributor an Excel file to assist the TMs in gathering their territory data. Using this file will save them several hours during the workshop.

The Distributor should supply the following:

- ★ Printers and paper (one printer for every 2 or 3 TMs)

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 are you doing on reaching your numbers for the year so far? Will you be on target or behind?

What are your plans to increase business the rest of this year and next year?

Problem

Do you ever have a hard time figuring out what to do with your dealers to earn more of their business?

Do you have a tough time finding good dealers to sign up?

Implication

If you don't do the things it takes to earn more of your dealer's business, how do you think you'll be doing in five years?

If you don't find good prospects for your account portfolio now, what do you think your sales will be like in five years?

Needs Pay-off

If you had a tool that could help you in helping your dealers grow and in finding good prospects and were taught how to use it, would you use it?

What would your sales be like in five years if you could master these skills now and start applying them next week?

Workshop Cost Estimating Sheet

Item	Quantity	Cost Ea	Net Cost		
Facilitation Fee (get quote from Lodestar)	1	\$6,500	\$6,500		
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).

It's tough running a territory, isn't it? Between keeping all your dealers happy, finding new dealers, and keeping me off your back, it's almost more than a person can do sometimes.

Yet, the price of survival means that we must constantly learn how to uncover our dealers' needs and go the extra mile to meet them, leveraging that service for sales and margin dollars. We must become better at helping our present accounts grow, identifying the ones that don't want to (or can't) and finding new growth-oriented accounts to help us realize our goals for the future. But how to acquire those skills?

You are going to have the opportunity to acquire those skills 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 you understand your territory like never before and help you identify specific strategies to help your dealers grow. You will also learn how to prospect intelligently, finding growth-oriented dealers who will join up with us and take us on a successful joy ride!

Mark your calendars for [date]. To be ready for this workshop, you will need to bring your laptop, a pen or pencil, a pocket calculator, and some note paper. You will also be given an Excel worksheet to complete prior to the course. It will help you collect data about your account portfolio, including your dealers' names, sales histories, and other important data. Filling this worksheet out prior to the workshop will save you an hour or more of input time.

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).

This is a reminder that you are confirmed to attend our upcoming workshop, “War College: Shock and Awe!”, conducted by Lodestar Consulting, on [date] at [location].

Be sure you bring your laptop, a pocket calculator, a pen or pencil and some note paper, as well as your pre-workshop Excel file I emailed you a few weeks ago. You may also find it helpful to bring some form of high-density data storage (a USB “thumb” drive or writable CD if you have a CD-RW drive).

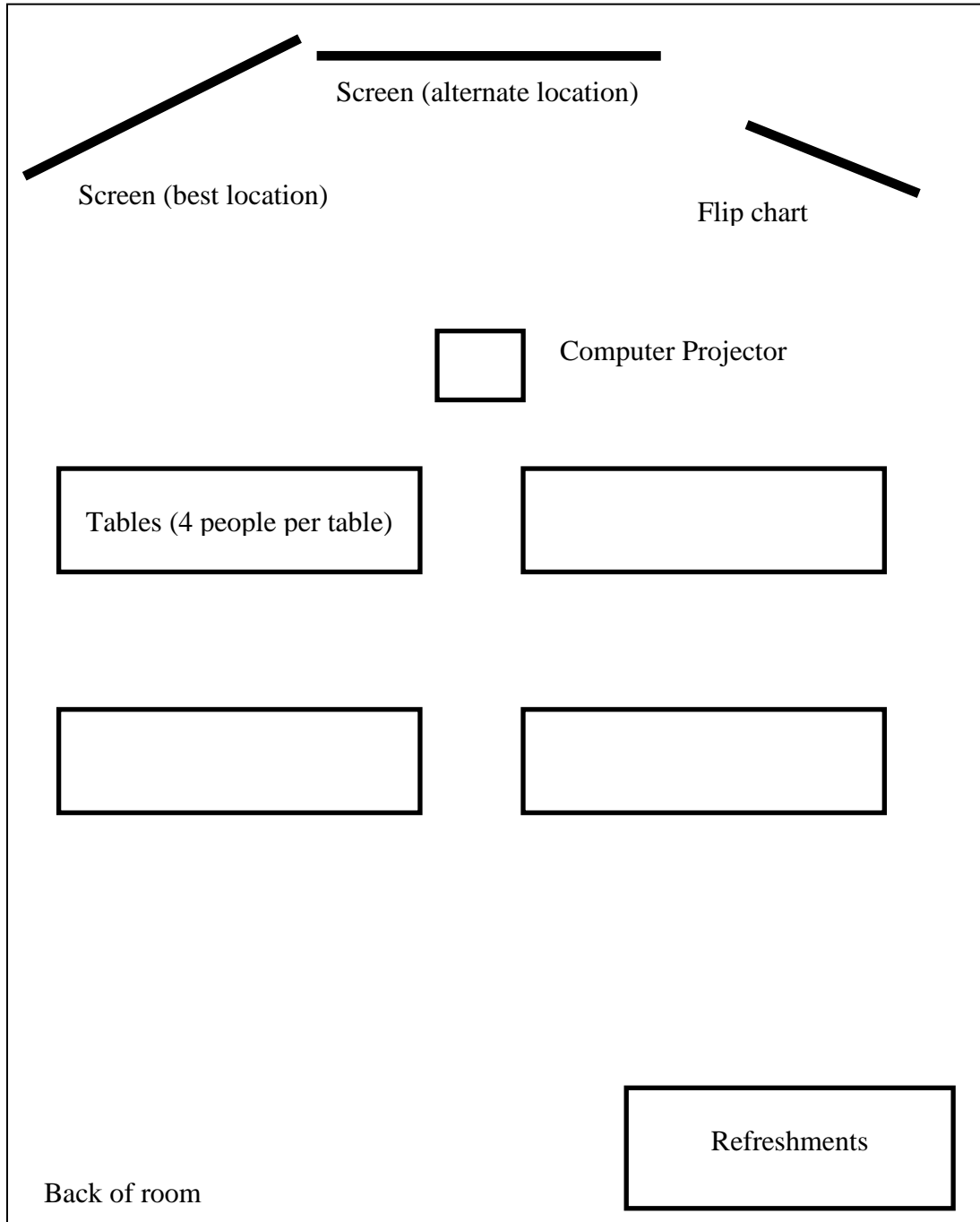
The meeting starts at 8:00 am sharp! We’ll have coffee and rolls ready for you.

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.