Jason Kleid, LLC

Organizational Change Program

Optimizing Sales Results via Continuous Improvement of Process

Jason Kleid

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12370 Arbor Lakes Parkway North, Maple Grove MN 55369

Desired Outcome:

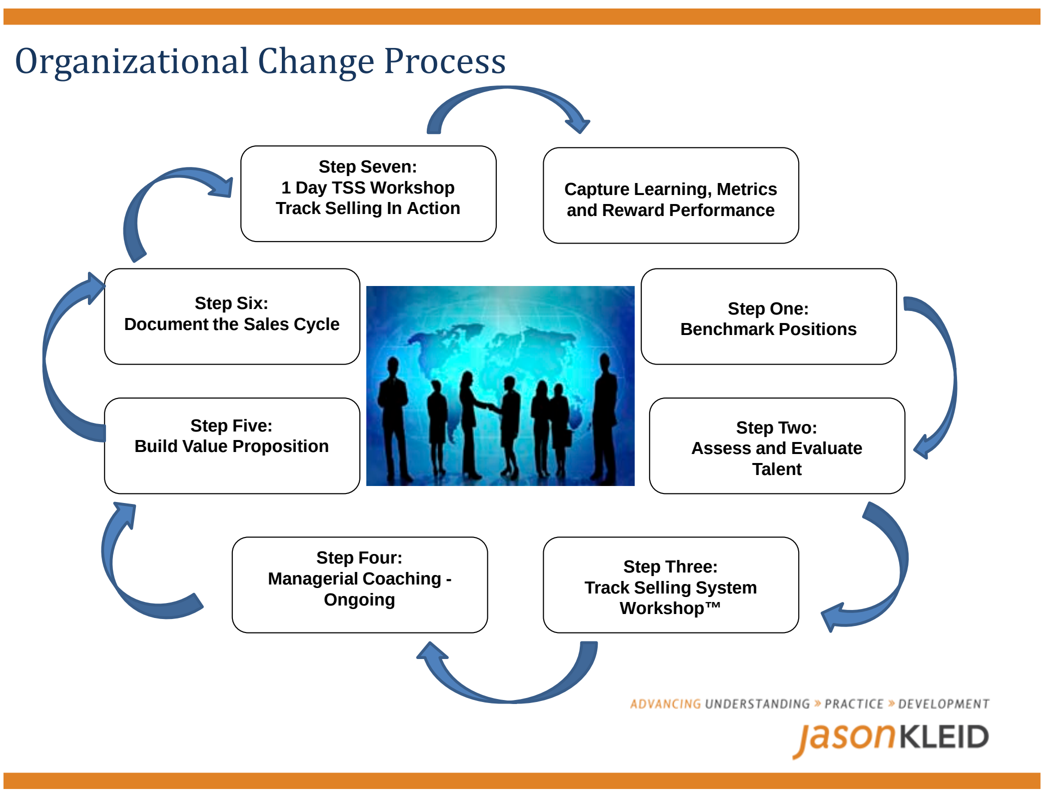
Jason Kleid, LLC Continuous Improvement Approach:

Jason Kleid, LLC has developed an excellent reputation for our consultative approach to business development. We believe that maximizing human performance and business development should be a continuous, long-term improvement process rather than a series of quick fix, short term, and do-something-for-the-sake-of-it type events. The latter merely breeds resistance and even skepticism to people and business development.

Making sure that the fundamentals/foundations of such a development process are firmly in place is critically important. Changing the nature and culture of a company takes time, planning and preparation and, above all, a systematic careful approach. We believe that the continuous improvement model and competency based learning need to work hand-in-hand with an overall strategy for continuous and lasting competitive advantage.

Simply put, my mission is to aid in the development of skilled and passionate employees, leaders, mentors and coaches within my client's organizations to consciously and effectively express their unique talents. To help my clients contribute at higher levels of competence and ultimately cement their position as highly prized and valued assets.

Described below is a visual of the flow of the Organizational Change Process



Organizational Change Process

The Organizational Change Process is the signature program. OCP is a powerful proven, personal, professional, team and organizational transformational process that maximizes human potential, intellectual capital, personal excellence and creates team and organizational systemic transformation.

The Organizational Change Model (see pictorial above) provides a systematic process of benchmarking, measuring and developing important competency gaps. It also provides extensive job and people management indicators to help the individual and the organization move to a mastery level.

Step I – Benchmark the Job

Objective: Benchmark the *Sales* position. This benchmark will clarify the accountabilities, behaviors, values, capacities, skills and how the job naturally motivates an employee. This tool will be used for any future hiring for this position, on-boarding, and the development of current employees. It will guarantee predictability while assuring the candidate will perform up to expectations. It will also contribute to higher employee retention rates.

What Jason will provide:

Jason will lead a team of Subject Matter Experts (SME's) in benchmarking the selected position

The following steps must take place in order to complete the benchmarking process:

Assembling Participants – You will need to select a "stakeholder" group. The "stakeholders" are those participating in the position survey. The team is to be made up of any who previously have been in the position and did a good job, managers of the position and other key individuals who deal with or are affected by the position.

For example:

- 1 person currently in the position
- 2 people who manage the position
- 2 senior-level executives
- The "stakeholder" team can be made up of <u>up to ten</u> (10) people and no fewer than six (6).

Accountability meeting – Once your stakeholder group is established, I will conduct a key accountabilities exercise prior to scoring a TriMetrix™ Job Plus assessment.

Key accountabilities meeting description:

This stakeholder group should be assembled together in my presence to guide and facilitate the accountabilities brainstorming session.

1) We will identify tasks of the job that are currently being performed
2) Tasks that should be but are not
3) Identify delegating unnecessary tasks (currently being performed) to others
4) Identifying the Key Results of the job
5) Prioritizing those Key Results
6) Identifying how much time should be devoted to those accountabilities (Key Results)

We should plan 3-4 hours for this meeting.

Next steps:

Respond to the Job Assessment Individually
Using the key accountabilities as a reference point, each Subject Matter Expert will respond to the online job assessment; to provide their input regarding the performance requirements of the job.

Online Survey and Results – The online survey takes approximately 45 minutes to complete, and the results are automatically fed back to me. Once all of the survey participants have completed the assessment, we generate the composite and averaged results.

Review the Multiple Respondent Report
Based on a unique analysis, the Multiple Respondent Report combines the input of all Subject Matter Experts to create a benchmark for the job that lists the job requirements in each category measured.

Compare Talent to the Job Benchmark
A talent assessment on the same scale as the job will identify the characteristics an individual will bring to the job, allowing you to easily determine the best job fit and identify coaching opportunities.

Discuss the Results & Implementation Strategy
Within the framework of a company overall selection process, effective hiring decisions can be made and productivity can begin immediately.

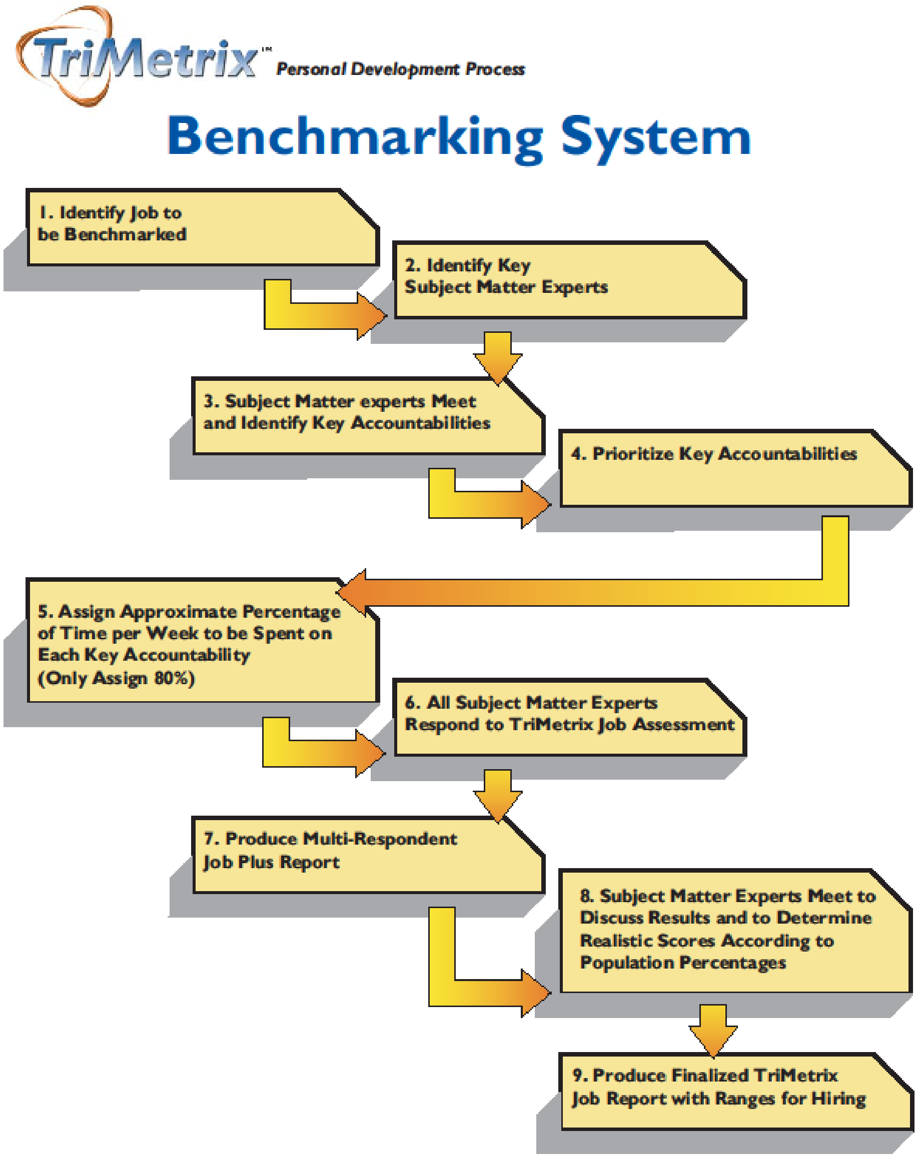
Your position benchmarks will feed back the following information:

- Job Attribute Hierarchy (talents required for success)
- Job Rewards (values the position rewards)
- Behavioral Hierarchy (behavior necessary for performance)

Receivables: Position Benchmark, which includes:

- **KEY ACCOUNTABILITIES**
- **JOB COMPETENCIES HIERARCHY** (25 areas – talents required for success).This section presents 25 key job competencies and quantifies their importance to this specific job. Each job has a unique ranking of competencies, reflecting different levels of capacities required by different jobs for superior performance.
- **JOB REWARDS/CULTURE HIERARCHY** (6 areas – values the position rewards).This section clearly identifies the rewards/culture of the job, which defines its sources of motivation. It clarifies “why” and “in what kind of environment” this job will produce success
- **BEHAVIORAL HIERARCHY** (12 areas – behavior necessary for performance). This section explores the behavioral traits demanded of the job. The higher the ranking, the more important the behavioral trait will be to the job for stress reduction and superior performance.
- **ACUMEN INDICATORS** (12 areas). This section represents the acumen needed for superior performance in the position.
- Library of RxCD’s

jasonKLEID
Changing Lives » Optimizing Performance



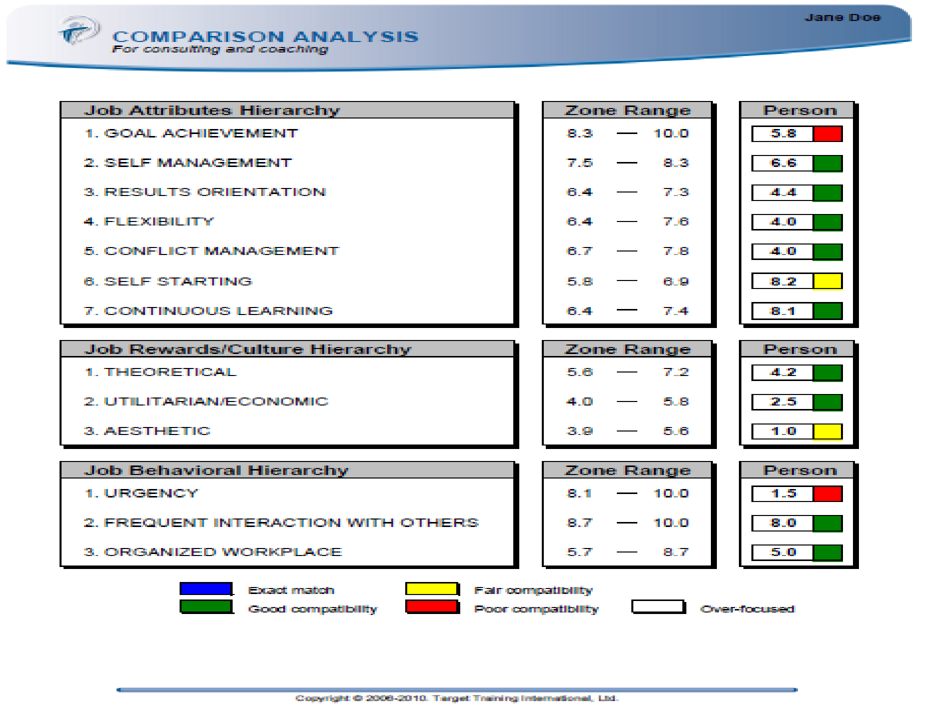
Step II – Assess the talent

Objective: The management team will be able to understand each job based on this unbiased comparison to the benchmark. Coaching reports will provide insight for each person to understand themselves, their natural and learned communication styles and how they can optimize communication with others. Managers will have concrete information to use in training.

"He who knows others is learned. He who knows himself is wise."
- Lao Tse

What Jason Kleid will provide:

1) New hires and/or current employees will then be matched to the Job Benchmark and a TriMetrix® Gap report will be produced. This report will clearly show where they match the benchmarked position and where the gaps exist. (See partial sample below)


Jane Doe

COMPARISON ANALYSIS
For consulting and coaching

Job Attributes Hierarchy	Zone Range	Person
1. GOAL ACHIEVEMENT	8.3 — 10.0	5.8
2. SELF MANAGEMENT	7.5 — 8.3	6.6
3. RESULTS ORIENTATION	6.4 — 7.3	4.4
4. FLEXIBILITY	6.4 — 7.6	4.0
5. CONFLICT MANAGEMENT	6.7 — 7.8	4.0
6. SELF STARTING	5.8 — 6.9	8.2
7. CONTINUOUS LEARNING	6.4 — 7.4	8.1

Job Rewards/Culture Hierarchy	Zone Range	Person
1. THEORETICAL	5.6 — 7.2	4.2
2. UTILITARIAN/ECONOMIC	4.0 — 5.8	2.5
3. AESTHETIC	3.9 — 5.6	1.0

Job Behavioral Hierarchy	Zone Range	Person
1. URGENCY	8.1 — 10.0	1.5
2. FREQUENT INTERACTION WITH OTHERS	8.7 — 10.0	8.0
3. ORGANIZED WORKPLACE	5.7 — 8.7	5.0

Exact match   Fair compatibility
Good compatibility   Poor compatibility   Over-focused

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2) An unbiased Coaching Report that will reveal the VALUES that motivate them, the BEHAVIORS that they bring to the job and an inventory of specific talents – or ATTRIBUTES –needed in order to perform the job. This Coaching Report will be used by their manager for individual development.

3) Jason will also be available for debriefings and mentoring on the coaching process.

The following is a summation of three areas in the assessments that will provide the mosaic for giving you important insights for development, reinforcement and also hiring.

The **HOW** of your actions
People are most productive in an environment that is in harmony with their own natural behavior. By understanding what behavior the present environment requires, the talent can modify his/her behavior and remain comfortable and productive.

Results/Benefits

- Outline personal behavioral strengths and the value that behavior can bring to the organization.
- Identify how a person will approach problems and challenges. Target characteristics that can move individuals from a mediocre to top performer with excellent people skills.
- Offer strategies for communicating openly, honestly and directly to get the results you and your organization need.

The **WHY** of your actions

What is it that causes you to move into action? What are the drivers of your behavior? What activities, careers and conversations inspire a “passion” within you, causing you to want to become involved? The Workplace Motivators Assessment looks at Personal Interests, Attitudes and Values and measures the WHY of your actions, leading to an understanding of the drivers of your behavior and the attitudes that move you into action.

The Assessment

The Workplace Motivators Assessment measures responses in each of the following six attitudes:

Theoretical: A passion to discover, systematize and analyze; a search for knowledge.
Utilitarian: A passion to gain return on investment of time, resources and money.
Aesthetic: A passion to experience the impressions of the world and achieve form and harmony in life; self-actualization.
Social: A passion to eliminate hate and conflict in the world and to assist others in becoming all they can be.
Individualistic: A passion to achieve position and to use that position to affect and influence others.
Traditional: A passion to seek out and pursue the higher meaning in life and achieves a system for living.

The computerized report shows each of the six attitudes compared to a National Average. You are provided with information on the WHY of your actions, which with application, can tremendously impact your valuing of life.

The capacities a person brings to the job

The third area of the report is its ability to assess an individual's cognitive structure (i.e., how their mind perceives themselves and the world around them). Unlike any other instrument, the PTSI portion has a direct relationship with mathematics, and this is the secret behind its ability to accurately measure the core dimensions of how we think. The result is an accurate ranking of personal ATTRIBUTES describing individual potential for workplace performance.

Unlike many other instruments intended for a clinical setting but adapted to a business one, the PTSI was designed, from the beginning, exclusively for use in a business environment. Its overall intent, format and output are specifically tailored to meet the needs of business managers and executives today.

Every person has the potential to be a winner. We all win in different ways. By understanding what attributes and capacities are needed in a person to successfully perform on the job, a manager can positively affect their employees winning performance.

What people need is a way to overcome personal barriers to success and in addition the knowledge and method to be able to build on existing strengths taking them to peak success. We will now provide everyone the resources they need to optimize performance.

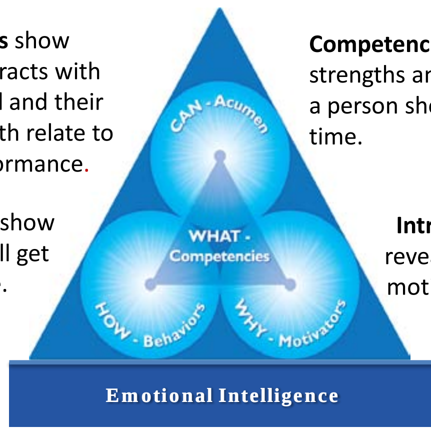
In addition, understanding the impact of Emotional Intelligence (EQ) on decision-making and growing ones EQ has been proven to bring bottom line results. Since a person grows naturally in their EQ overtime, learning how to expedite this growth process is the course of wisdom.

See the diagram on the next page that captures all of the previously explained growth areas.

TriMetrix™

Acumen indicators show how a person interacts with the external world and their internal world. Both relate to their level of performance.

Competencies define natural strengths and indicate where a person should focus their time.



Behavioral traits show how a person will get the job done.

Intrinsic motivators reveal why a person is motivated to perform on the job.

Emotional Intelligence (EQ)
EQ maximizes utilization of competencies, behaviors, motivators and cognition.

Personal Development & Hiring
"What you've discovered means nothing... unless you take what you've learned and build on it". In order to ensure employees and any new hires for the benchmarked position use the Job Attributes, Job Rewards and Job Behaviors on the job, I recommend the immediate implementation of the following tools for follow-up and reinforcement.

Once employees or new hires have been matched to the benchmark, they are assigned specific prescriptive Rx Development Resources and Workbooks. These are unique to the newly-established position benchmark.

Each of these developmental tools will be targeted to the Job Attributes, Job Rewards and Job Behaviors and Acumen established by the Job Benchmark.

Each and every Rx assignment gives you an in-depth online audio course and course manual with real-life applications with regards to the specific, targeted areas of development designed to maximize potential in each area revealed by the benchmark.

Each online Rx contains a self-study course:

1. A <u>printable</u> course manual geared directly towards the attribute that needs work, targeting your personal and unique areas of development.
2. A complete <u>audio course</u> that can be listened to online.

Each course contains:

- A precise definition of the attribute
- A thorough explanation of why this skill is important - you can't commit yourself to mastering a skill until you know why it's critical to your success
- A list of skills associated with that attribute
- Examples of skills displayed by those people who've mastered that specific attribute

- A series of exercises designed to help you implement the skills and behaviors associated with that attribute in your own personal and professional life

Each member of the team could select an important capacity in order to reach Mastery of that capacity. The selected capacity should be important to their performance as managers/leaders.

Then a schedule to review with their mentor/coach to measure their level of mastery should be arranged.

Step III – Selling Skills Workshop

Objective: To provide a selling process that will help them to close more sales. It will do so from the paradigm of “Seeking first to understand and then to be understood.” To grow a customer focused view rather than a product centered view.

What Jason will provide:

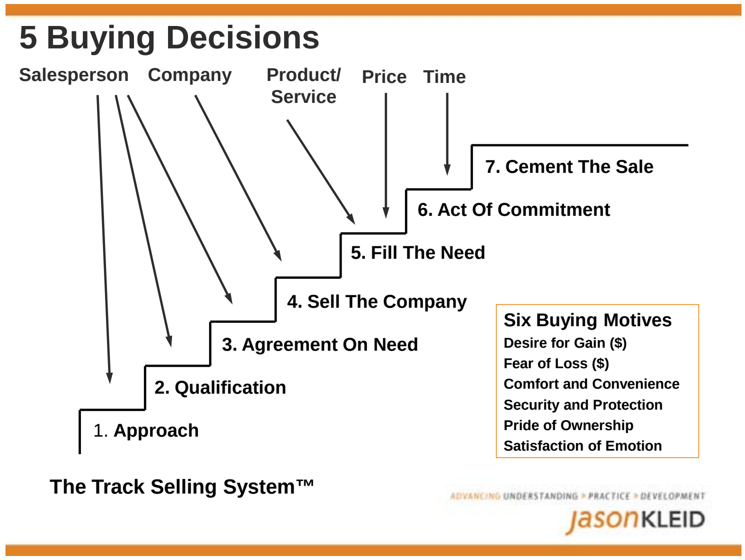
Selling in today’s market has many challenges. It requires the most contemporary and most professional selling skills available. Producers must be able to differentiate themselves and their company in a crowded market that is selling on price. It is essential for the health and well being of your company that they increase sales without succumbing to the pressure of lowering their price.

Jason Kleid will share with you proven, successful techniques in selling and communication.

Some of the subjects we will be addressing are:

- The art of building relationships to build sales
- Exploration of "why people buy" and "how people buy"
- Examination of the five decisions that must be made by a prospect prior to the decision to buy followed by an examination of the techniques that a producer must use to prompt the decisions to be made.
- The importance of selling the company and how to do it
- How to sell value over price
- How to become effective in communicating your message for the prospect’s reasons
- A structured approach to selling that assures a salesperson's ability to stay on track
- Understanding that the prospective contributor's needs mean more sales
- How to maximize sales
- A simple, low pressure, yet persuasive method to closing the sale
- Positive and effective method of handling objections
- Discussion on time management and the importance of planning

Jason will share a procedure that takes the mystery out of selling. When selling becomes a procedure, it ceases to be a problem. When it’s not a procedure, it will always be a problem. The Track Selling System™ will allow managers to manage skills and techniques and not personalities. Bottom line: long-term motivation for improved results.



Track Selling System™ Course outline– First Day

First Day: 8:00 am - 5:00pm

Keys to Professional Selling

- Pyramid Of Success
    - ❖ How Interest and Attitude influences how we sell
    - ❖ How and why to continue building a professional sales career
    - ❖ How Energy, Method results in Success
- Defining the professional salesperson

Scientific Selling

- Five Buying Decisions and their precise order an exploration of How people buy
- The "TRACK" - Seven steps to the sale
- The importance of rapport in relationship selling and how to develop it
- Importance of physical appearance in the sales process
- Attitude of the salesperson and its effect on sales
- The sales cycle and how to work it
- Tangible vs. Intangible sales

Steps One and Two: Approach and Qualification

- The importance of preparation
- Motivation – An exploration of why people buy
- Non-verbal communication signals and impact
- Seven ways to improve your people to people effectiveness
- We are in the people business
- Active listening – the untaught skill
- Three rules of communication
- The importance of qualification and the art of developing and asking the right type of questions
- Questioning techniques: kinds, types and when to use
- Telling is not selling

Step Three: Agreement on Need - Understanding your prospect's unique situation

- Assuring your understanding of what the prospect's/client's needs means more sales
- A step that is the difference between success and failure in selling
- Introducing the Sales Plan
- Individual development of the "Track Dialogue"
- Role-play

Today's Most Important Idea

End of first day.

Track Selling System™ Course Outline – Second Day

Second Day: 8:00 am - 5:00pm

Review of Day One

- Things to Remember
- Questions, Comments and Observations
- Review of home-fun

Step Four: Sell the Company

- Understanding the psychology of why they should do business with your company
- What your prospects needs to know about your company
- How to sell the company
- Use of visuals and their importance to communication: How, when, and why

Step Five: Fill the Need

- Describing your product or service: Features, benefits and reaction questions
- Translating features into benefits
- How to keep the prospect engaged
- Using intangibles
- How to get your price without "giving away the store"

Step Six: Closing the Sale – Act of Commitment

- A low-pressure highly effective procedure for closing the sale or getting the act of commitment
- A new way of handling objections positively and effectively

Step Seven: Preventing Buyer's Remorse– Cement the Sale

- Techniques preventing buyer's remorse and keeping the sale sold
- Principles and Concepts of tactical and strategic actions that contribute to success
- Identifying next steps
- Full role-play

Today's Most Important Idea

Most Important Idea Overall

Does it work? See Survey.

NOVEMBER 2010 TSS SURVEY:

3. After completing the TSS program, have you been more successful in selling to new customers?

	Response Percent	Response Count
Yes	84.7%	50
No	15.3%	9
	Why?	40
	answered question	59
	skipped question	0

4. What increase in sales (dollar volume) would you attribute to your use of Track Selling?

	Response Percent	Response Count
100% or more	0.0%	0
50 – 99%	10.2%	6
25 – 49%	16.9%	10
10 – 24%	49.2%	29
Less than 10%	23.7%	14
	Additional Comments:	8
	answered question	59
	skipped question	0

76.3% have experienced a 10% or greater increase in sales due to TSS!

6. What specific skills/strengths did you develop (or improve) as a result of the Track Selling System program?

	Response Percent	Response Count
Understand the sales process	57.6%	34
Listening skills	**67.8%**	**40**
Qualification skills	44.1%	26
Sales professionalism	37.3%	22
Method for handling objections	32.2%	19
Closing more sales	32.2%	19
Presentation skills	18.6%	11
People skills	18.6%	11
Goal setting techniques	40.7%	24
Appointment getting	5.1%	3
	answered question	59
	skipped question	0

PEPPERDINE UNIVERSITY SURVEY 1993

Effectiveness of the Track Selling System™
based on a research study by Pepperdine University

The old adage says: "You're either born a salesperson, or you're not…and that's that." We strongly disagree. We believe any individual who is willing to study, practice and apply our sales process and philosophy, not only can, but will succeed.

And we have the numbers to prove it.

To be truly effective in selling, salespeople need to understand the selling process. They need to know why and how people buy. They need to know that the only reason to make a sales call – ever – is to be of service… They need a process for selling.

That's what I believe in and teach. It's what our Track Selling System™ is all about, and why – as you'll see in the survey results below – we have been so effective in empowering salespeople to succeed.

Pepperdine University surveyed 1500 of our graduates* and asked the following questions:

1. Did the professional selling program impact your performance?

Yes: 98.92% No: 1.08%

2. What increase in sales (dollar volume) would you attribute to your use of Track Selling?

Increase	Percentage of respondents
100% or more:	5.2%
50 to 99%	21.0%
25 to 49%	34.4%
10 to 24%	27.3%
Less than 10%	12.3%

More than 60% of our graduates experienced a sales dollar increase of 25% or more after attending our program.

3. In using Track Selling, are you now selling a wider range of your company's products or services?

Yes: 88.1% No: 11.9%

4. After completing the TSS program, have you been more successful in selling to new customers or clients?

Yes: 96% No: 4.0%

5. What specific skills/strengths did you develop (or improve) as a result of the Track Selling International program? (These responses were not prompted in any way. The percentages represent "write-in" responses to the open-ended question.)

"Write-in" Skill	Percentage of Respondents
Understanding the sales Process:	76.0%
Listening Skills:	62.0%
Qualification Skills:	56.6%
Sales Professionalism	52.0%
Method for Handling Objections:	46.8%
Closing More Sales:	45.9%
Presentation Skills:	44.3%
People Skills:	41.0%
Goal Setting Techniques:	29.4%
Time and Territory Management:	20.3%

(Other skills listed: How to act-not react; handling rejection; developing self-confidence; attitude; how to identify customers needs; sell – don't tell; asking the right questions; cold calling skills; rapport building skills; a format to work from; meeting customer's needs; planning and preparation and more.)

6. Were you successful in selling your products or services to the prospect or client you focused on during the training period?

Yes: 60.0% No: 40.0% ***[continued on next Page…]***

Six out of every ten participants in the program successfully made the sales in the real world which they developed in the workshop – 60%!

7. If you are selling a different product or service, were the skills transferable to the new product?

Yes:	69.64%
Most of the time:	19.64%
Some of the time:	8.93%
Not at all:	1.79%

Nearly 90% (89.28%) of the participants felt they learned transferable skills.

8. Are you still using the Track Selling System?

All of the time:	27.17%
Most of the time:	38.15%
Some of the time:	32.95%
Not at all:	1.16%

More than 90% of the participants surveyed are still using the Track Selling skills and concepts more than a year after attending the program.

9. What other sales training courses have you participated in prior to or following the Track Selling program? How did the Track Selling program compare?

Of all the competing programs attended by Track Selling™ participants, our respondents found the Track Selling™ program…

Better than the competition:	90.20%
Equal to the competition:	8.82%
Comparatively disappointing:	.98%

More than 99% of our participants rated the Track Selling program as better than or equal to any other sales training program; less than 1% found the Track Selling program "disappointing" by comparison

*12.5 response rate (survey completed 3/93)

Both the 1993 survey and the 2010 survey prove the Track Selling System works! Bottom line = ROI!

Step IV – Reinforcement & Development

Objective:
Princeton University studied the way adults learn and developed the 70/20/10 adult learning model.

- (70%) of the way adults learn is in an experiential setting.
- (20%) of learning takes place at Point-of-Need.
- (10%) in classroom training.

Therefore real learning is put squarely on the shoulders of Sales Leaders to: coach, manage, reinforce and challenge the sales force to use TSS. The job the Sales Leader does contributes to either success or failure for his team.

For that reason both Sales Leaders and the individual sellers are challenged to commit to ***practice*** what they have learned. They need to form *new* habits leading to better decision making. Changing behavior as we know is not easy. Through regular coaching most of your sellers will eventually apply more and more of the TSS skills, which will result in increased sales and ROI.

What Jason will provide:
I will provide a Tip of the Week reinforcement program for 53 weeks.

The Method:
After each group completes their training they will be emailed a Tip of the Week

The Outcome:
Accountability and commitment are two top performance indicators. To the extent that management and individual members of the sales force become personally accountable to learn and use the selling system, and commit to performance improvement, to that extent they will benefit from a potential increase in sales.

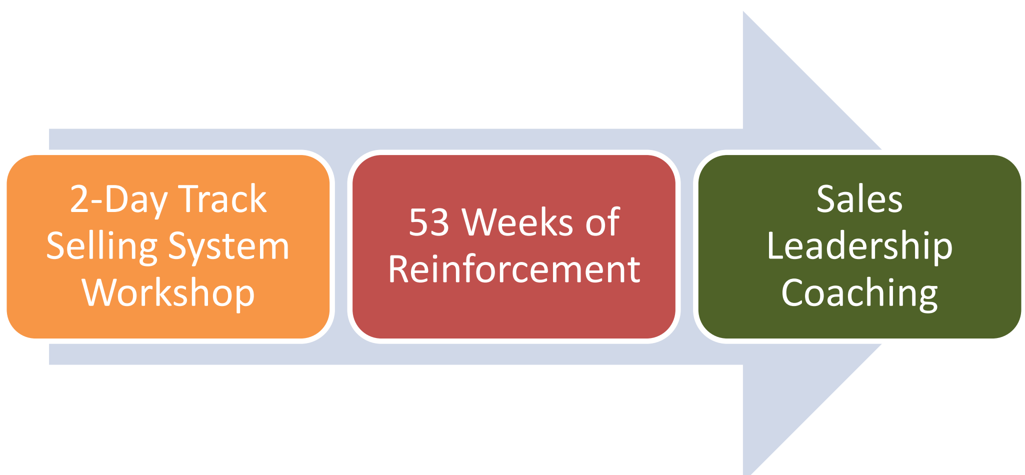
TSS Practice, Reinforcement & Coaching:
I will provide a weekly reinforcement program to be managed internally. Your entire team will be receiving a Tip of the Week. Each tip will bring out a lesson learned in the course or some other aspect of professionalism in sales. The program requires each Sales Leader to review the Tip of the Week at their weekly sales meeting. This will help the sales leader by providing them with a

motivating topic to discuss. Additionally it provides the proof that the concepts and principles work in the real-world selling environment of your sales environment.

Consulting & Sales Coaching:
Part of the change process requires a long-term commitment by me. The sales team will meet by phone once a quarter to review what's working, and why. We will also discuss what's not working and what to do about it. In addition, our focus will be on building on what we have laid and to brainstorm next steps. I will provide my expertise while your team provides the insights into the market, and current challenges.

In addition, I will make myself available to the sales team when individual members have questions or get stuck.

Objective: The objective of an ongoing consulting engagement is to have your sales leaders and sales team have access to myself at the times they need it the most. Learning moments occur many times when there is a pressing need. To have someone available to help you think things through is invaluable. Sometimes just being able to talk to someone is all that is needed to bring clarity to the problem or issue at hand. Having a coach available helps a person to become self-aware, self-correcting, and self-generating.



What Jason Kleid will provide:

I will be available for conversation on an as-need basis. In addition, we will have regularly scheduled quarterly conference calls with management.

Step V – Create the value proposition

Objective: Validate and capture your company's value proposition as a best practice.

Having the right tools and ability to provide messaging that is relevant to the individual buyer is key for building confidence in a sales channel. VARS, distributors and your own salesforce need to be skilled and confident in selling the *value* of doing business with your company.

In addition, the sales channel needs to differentiate the company and its solutions from the competition. This requires language that is meaningful and relevant in order to communicate those important messages in the right manner. Our goal will be to capture and record best practice for your value proposition.

The Value Proposition tool, will contain:

- Well-designed ***qualification questions*** to assure accurate understanding of business needs and qualification of the prospect. This will assure that real and valid proposals with a real opportunity for closing is generated.
- Well thoughtout ***features and benefits*** of your company's value-added product and service solutions.
- ***Relevant points about the company*** that your customers need to hear to help them make a positive buying decsion about your company.
- One of the challenges for salespeople is obtaining meetings to fill the sales funnel. As an aid to getting more appointments and assuring voice mail messages are returned this tool will also contain well constructed ***Interest-Getting Statements and Interest-Getting Questions***.

This tool will also facilitate quicker ramp up for new hires. Any marketing efforts will harmonize with what the salespeople are selling through use of this tool.

What Jason will provide:

I will facilitate a ***one-day session*** with your SME's (subject matter experts) to instruct, guide and help review and rework if needed your Value Proposition sales tool. I will then edit any and all assignments that the SME's submit after the session, assuring a meaningful document that can be used by current and future sales people to gain greater effectiveness.

This tool if used properly will be considered best practice for gaining appointments, qualifying and selling your story.

The Outcome:

Your customized Value Proposition tool will provide clarity and focus to answer the questions "Who are we?", "What are we selling?" and "How do we sell it?" We will have created the ability to provide salespeople regardless of where they are, with a higher degree of confidence, by clarifying what the company is all about.

Step VI – Document the Sales Cycle

By documenting and mapping the sales cycle you will create a means to ramp up new personnel while providing clarity to the strategic aspects of a sales cycle. When used properly the sales cycle document will help the solution sale to move forward and the sales rep to stay focused on selling the right things, to the right people and at the right time.

This tool will identify the phases in solution selling sales cycle. Revealed will be the sales calls required within the phases, the objective of each phase, the mindset of the prospect, the act of commitment required to move the sales cycle along, who typically attends each of the sales calls, what is recommended to bring to the meeting and provide after the meeting.

This will be a powerful visual that succinctly communicates with all stakeholders.

The greater purpose of documenting the any sales cycle is to help the professional sales person or sales team plan for a sales call by providing all pertinent data about expectations from the prospects perspective, their current and future mindset. In other words it tells the salesperson what they need to do to move the prospect toward the close.

The Method:

After choosing appropriate team members we will in a one-day session brainstorm and identify the various phases to your sales cycle, challenge current views, and then re-engineer if need be. We will also determine who should be called upon, their current mindset, objective of the call, what to bring, present or leave behind if anything at all. We will determine the milestones or how many calls will get the job done. This template can be used to quickly ramp up new salespeople, help the manager to manage the sales process and provide direction for the team.

What Jason will provide:
Jason will facilitate the brainstorming event and be responsible for the success of the project.

Recievables:
Best practice documentation for your sales cycle.

Champion's Strategic Road Map™

Stage	I	II	III	IV	V	VI	VII
Stage Description	**Prospecting**	**Relationship Building**	**Qualification**	**Project has been identified**	**Project verification**	**Verify Details & Present Proposal**	**Cement the Sale**
Prospect's Mindset Before The Call Or Meeting	They are aware of the competitions products They are looking for a way to increase their bottom line They are not familiar with CI	They are wary, busy, expecting just another sales person and they are pressed for time. They are not sure they should spend time with you. What can this person do for me? Marketing materials have created curiosity.	Receptive to new ideas May view you as a consultant and resource Not convinced that we are a vendor that can provide: solutions, quality, on time delivery, service and value	Need our help Anticipating a high level of service Show me you can do it. Confident in us and our company as a viable vendor	Eager to see if this solution works and is affordable. Might have concerns about delivery Looking for guidance on how to sell internally or to their client	Concerns have been addressed Ready to negotiate final details	Happy customer Appreciate your attention to customer service and detail Anticipating your contact
Prospect's Mindset After The Call Or Meeting	Now aware of CI Optimistic that they have found a possible new source Looking forward to a next step with CI	Their time was well spent Glad they found me Enthusiastic I found something that can solve my problems You have become in their view a part of their team There is value. They are open to further contacts by us	To know that we have integrity and good judgment. We are selling for their reasons More confident in company and salesperson View us as a partner that understands them Looking forward to the next steps	They have developed a greater appreciation for you as a consultant Open to your recommendations They are ready to look at mock-ups and pricing. They are now asking: How can I sell this internally?	How soon can you deliver? They now feel confident in choosing you and looking forward to doing the project	Willing to sign-off on project Willing to issue P.O. They are a happy customer	Impressed with your level of customer service and attention to detail Reassured. Looking forward to next project
What to Bring to Meeting	Does not apply	Agreement on need letter	Agreement on need letter Agenda Samples	Agreement on need letter	Agreement on need letter Mock-up Copy of proposal	Copy of final proposal	Send job sample
Act Of Commitment	Appointment	Phone call, send something, meeting, talk to someone else, send them to our website. Summarize the meeting.	Next appointment to present solution	Next appointment for project review	They will present project for client approval	Verbal agreement to send artwork and if needed to fill out credit application. Ask for referrals.	Schedule next conversation to continue selling new products and services Ask for referrals
What to Provide After Meeting	Agreement on need letter	Agreement on need letter Provide price ranges if appropriate Specific samples appropriate to your conversation Specific names & references	Agreement on need letter	Agreement on need letter Bids Mock-ups	Address any concerns prior to final meeting	Thank you. Provide phone numbers and names of other CI personnel involved in their project	Sharing information related to their interests. New samples Personalize next marketing campaign

Step VII – One Day Coaching In Action Workshop

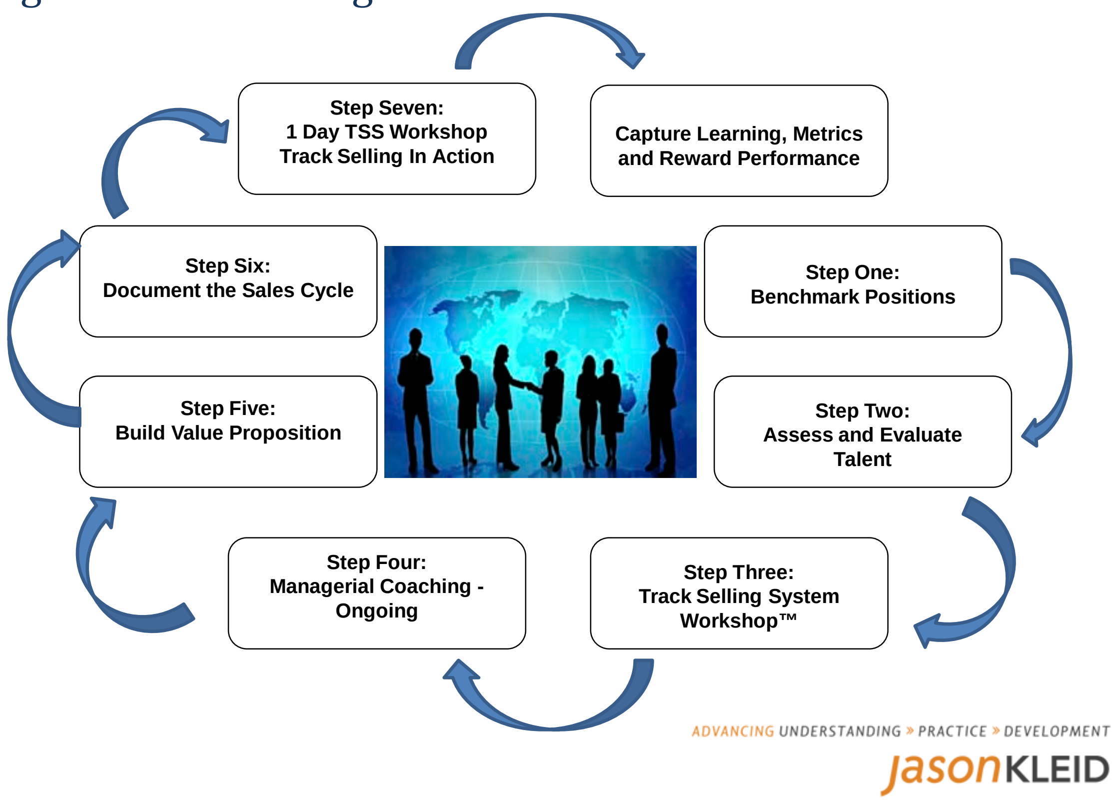
After approximately six months we will assemble the original participants for a one-day workshop. This will be with the purpose of reviewing, reinforcing and practicing Track Selling with greater experience, awareness and capability. The outcome will be bringing the sales organization to the next level of professionalism.

Summation:

This was an overview of a solution which has been designed to bring about long-term optimal performance for your company, its employees and stakeholders.

The outcome you desire is accurately summed up in the words of acclaimed author Stephen R. Covey: ***"True effectiveness is the ability to create results in such a way that one may duplicate them time and time again."***

Organizational Change Process



"In a time of drastic change it is the learners who inherit the future. The learned usually find themselves equipped to live in a world that no longer exists." Eric Hoffer – American Philosopher

What is necessary to make this next year of effort and investment pay off?

1. A commitment from management to learn, change and follow through
2. Managements' readiness to provide the resources in time, personal effort and money
3. Commitment from the sales force to personal growth and desire to be successful
4. Commitment from Jason Kleid for a long-term relationship with your company

Jason Kleid

Facilitator

About Jason Kleid

My experience in starting and growing two businesses coupled with more than 30 years of selling has contributed to my ability to help my clients overcome many of today's business challenges. Much of my work focuses on helping leaders transform their strengths into HD quality.

I have been interviewed by the Star Tribune, published in trade journals, written a white paper on the sales process for Techtextil Symposium North America and continue to publish articles in columns for client's newsletters.

I am a coach, sales strategist, trainer, writer and public speaker. I use my experiences from working with clients from highly technical to non-technical businesses, from across the country and internationally to help salespeople fulfill their role as professional salespersons.

Certifications: Certified Track Selling System Instructor (CTSSI) Certified Professional Behavioral Analyst (CPBA), Certified Professional Values Analyst (CPVA), Certified Professional TriMetrix Analyst (CPHDA) and Certified EQmentor and EQ Coach, Certified Professional Emotional Quotient Analyst (CPEQA).