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# Advanced Sales Skills and Business Development for Professional Services

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How to Generate More Business Than  
“Traditional Sales” Ever Could!

## Program Introduction



## Advanced Sales Skills and Business Development for Professional Services How to Generate More Business Than “Traditional Sales” Ever Could!

Generating new business is becoming increasingly difficult - the game has definitely changed, new trends have emerged, and customers have undertaken to get information on their own instead of relying on experts.

More and more businesses are failing to gain and keep customers. Why is this happening? And how do we deal with all of this?

If the game has changed, it's time for a new playbook.

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## Program Purpose

This program is the integration of two different systems, **The Business Developer™**, and **The BD Strategies Navigator™** both designed to assist people in service-based businesses how to attract and secure new business. As a result, the purpose is two-fold:

1. **The Business Developer™** – To provide professionals in service-based businesses with the skills, tools and perspectives they need to secure new clients at a profit in today's changing marketplace; and
2. **The BD Strategies Navigator™** – To assist professionals to choose and implement the right mix of business development strategies to gain and keep more of the best-fit clients for their organizations, consistent with their company's goals for growth, profit and impact.

The program has two parts. Part 1 covers strategies to move from “lead to deal”. In other words, once a potential client is identified, how to secure business from that party.

Part 2 deals with business development strategies to attract the best-fit clients to explore business relationships with the company.

In summary, part 1 covers lead to deal strategies, and part 2 addresses how to generate and nurture more viable leads.

## Outcomes for Participants

In Part 1, participants will:

1. Understand the contributing factors that cause businesses to fail to secure and maintain enough customers to survive and prosper
2. Learn the three core and constant elements that are consistently needed for generating business - not “selling”
3. Through the 12 learning modules, build a Playbook for new business generation - detailed for practical implementation, and adaptable to different situations.

In Part 2, participants will:

4. Learn the foundations for business development strategies,
5. Determine which strategies to apply, and
6. Identify how specifically, and when to use them.

## Intended Audience

- Business development personnel within professional services firms;
- Business owners, whose revenues are up to \$1 million annually; and
- Salespeople of entrepreneurial companies of any size

## Program Logistics

### Hours:

**Advanced Sales Skills and Business Development for Professional Services** is conducted within a period of 12 months, in a series of 12 monthly 3-hour sessions (36 hours in total), live classroom based. In addition, participants have access to email support from the facilitator through the program.

Participants are assessed on class participation, on assignments between sessions, and their presentation on the last day of the program. Upon successfully completing this program, participants receive a Certificate of Completion.

### Fees:

Fees and terms are available on request. Taxes are extra where applicable. This program fee covers both halves of the program. For live, in-person versions, discounts are available for groups within the same company. Please contact us for more details at [info@walshbusinessgrowth.com](mailto:info@walshbusinessgrowth.com)

### Dates and Registration:

This program is available either within companies, or from time to time it is held for smaller mixed groups of people from different companies, usually in different cities/countries.

To check for a detailed list of the dates and availability, or to find out more about the application process, please contact us at [info@walshbusinessgrowth.com](mailto:info@walshbusinessgrowth.com)

### Facilitator:

#### Michael Walsh – BIO

Michael is a visionary leader, speaker and author known for igniting passion in the entrepreneurs he works with by helping them drive their businesses to growth levels beyond their expectations. For over twenty years, as Founder of Walsh Business Growth Institute (formerly Kaizen Consulting Services), Michael's unique ability has been to maximize owners' goals for more profit in their business and more freedom in their lives.

Michael's core belief is that businesses must be designed to achieve owners' goals for themselves, their employees, their clients and the communities they serve. With an advanced understanding of business models and structures, he takes the guesswork out of building a high-functioning company. His expertise stretches across business disciplines including: finance, sales & marketing, recruiting & people management, leadership development and succession planning, to name a few.

Clients say that Michael has a rare ability to communicate sophisticated business strategies in a simple way, and that his people skills have helped them resolve their trickiest interpersonal problems with customers, employees, and business partners.

His professional studies include the following -

- Undergrad Degree: BA with a double major in Commerce and Economics from the University of Toronto (1982)
- Graduate Degree: MBA in International Business from Asia Pacific School of Management Studies (1995)

Michael has published two books:

1. **Business Growth By Design – How to Tap Your Potential Without Getting Tapped Out** in 2010
2. **Thinking Big is Not Enough – Moving Past the Myths and Misconceptions that Stop Business Growth** in 2015 – an Amazon Best-Seller.

In addition, Michael has developed and delivered over 25 different programs related to sales, marketing, increasing operational effectiveness, business development, business growth, management training and leadership training. Many of these programs have been accredited for continued learning from professional associations, including Architects, Engineers, and Chartered Accountants, as well as Canadian government acceptance of accredited training programs for management and leadership development and overall business growth.

He is currently working on his third book, on how to develop a Powerful People Plan for a company undergoing large-scale growth. Also in development is his latest program – Strategy and Human Behaviour for senior leaders of growing companies.

Michael lives what he teaches: applying his methods, he has built Walsh Business Growth Institute into a company that provides:

- clients with clear access to sustainable, large-scale growth,
- his staff the opportunity to learn and grow in meaningful ways,
- while also providing him the freedom to take eighteen weeks of time off each year for personal travel, together with his family.

The following is the Program Overview, broken down by each of its two Parts.

## Part 1: The Business Developer™

### Areas Of Focus and Themes

The 3 Core and Constant Elements, the 10 steps of **The Business Developer™** will provide you with clear access to generate more business than sales ever could, as you gain and keep more customers at a profit, in support of your goals and commitments in life.

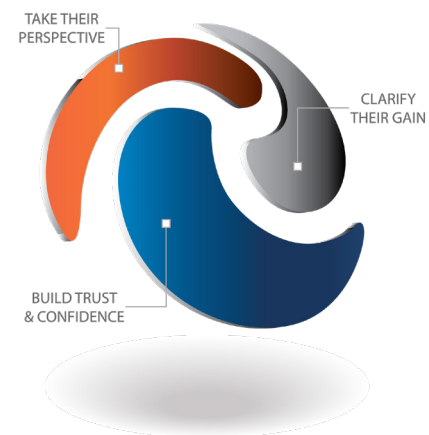
### 3 Core and Constant Elements

There are three core elements, all of which need to be consistently present as relationships with clients evolve.

As they relate to the customer, these components are:

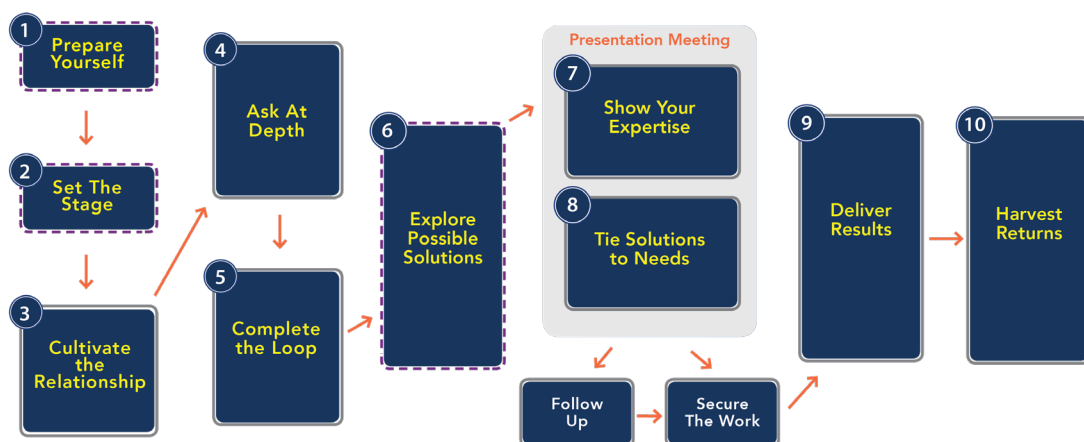
1. Take their perspective;
2. Clarify their gain; and
3. Build trust and confidence.

All three of these elements are critical to success in new customer acquisition if you want to be successful on a sustainable basis.



### The 10 Steps Outlined

**The Business Developer™** program has 10 steps.



In the subsequent modules of this program, we will delve into each of these steps, clarifying and demonstrating how to shift your process (or enhance what you may already be doing intuitively) in order to generate more business without having to resort to “sales” (i.e. convincing anyone of anything).



The steps are as follows:

## 1. Prepare Yourself

Before you are ready to interact with potential customers, there are a number of areas to check in regarding yourself, namely:

- a. Where do I fit in with the dynamics of the new technology driven, informed-customer marketplace?
- b. Where does my company have a unique advantage to maximize customer value?
- c. For whom is our unique advantage the best mutual fit?

## 2. Set The Stage

With a high level of clarity in hand, now it is time to go deeper. We will determine the elements of making the value exchange obvious. Once the mutual gain behind the transaction is understood and trusted, giving up \$1 and getting back \$5 is very simple. The value exchange is obvious. Is the value exchange for your product or service that obvious? If so, can it be trusted? That is the work of this segment. This includes building (or adjusting) your collateral marketing materials and sales aids to support you in making the customer's win completely transparent and worthy of their trust.

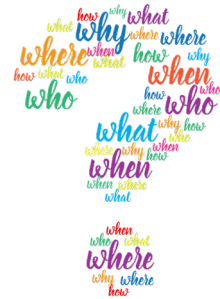
## 3. Cultivate the Relationship

Whether you are providing something small, or a large-scale, custom engineered solution, you always need a relationship to do business. In this step, we start to unfold how to cultivate that relationship, right from the start. In both large and small deals, there are specific steps that, if taken, start to firmly develop that relationship. We define and work with the elements of enrollment, which we assert constitute the first principles of effective customer acquisition.

The goal of Step 3 is to develop the relationships at sufficient depths to be able to ask, and gain answers to questions two levels deeper than your best competitors every would or could go. In both single visit and multiple visit customer acquisition situations this ability to go deeper is critical.

## 4. Ask at Depth

With relationship development firmly underway, the goal is to ask questions so deep that you are able to uncover the deeper needs, wants, desires or concerns of your customer. This will provide you with access to find ways to actively increase your customer's gain in working with you. This will form the raw materials for changing the basis of comparison away from price and onto "fit-to-need". As with each of these steps, the 3 core elements will be in active use here.



## 5. Complete The Loop

This simple step is perhaps the most overlooked of all 10 steps of this process. Yet, it may also be the most important. It is not sufficient that you understand all the relevant aspects of your customer's situation. Your customer needs to understand that you understand.

This is accomplished by completing the feedback loop, as a separate step, in advance of any proposal of your goods and services (and by 'in advance', I don't mean at the front of a proposal document). Done correctly, the result will be a very effective increase in trust and confidence, sufficient, in most cases, to facilitate eventual business together.

## 6. Explore Possible Solutions

Armed with all the information of your customer, it is now time to get to work. You may already know the solution(s) you plan to propose to your customer. With this step, you may well expand what's possible for your customer including options and different approaches in support of your customer's movement forward with you.

## 7. Show Your Expertise

You have dug deep into your customer's situation; you have gained agreement on what they have shared. You have explored and found the best alternative for them. Now it is time to present. There is a way to bring your expertise to the table – in advance of your solutions presentation – that will take away any need to 'close a sale'. Very potent! You will be very excited to work through this segment, in support of your customers and yourself!

## 8. Tie Solutions to Needs

Your customers have outlined their needs to you. There is a way to unfold your solution, tying each aspect to the stated needs, from your customer's perspective, clarifying their gain, and building trust and confidence such that doing business together is an effortless extension of this step.

## 9. Deliver Results

Your potential customer is now a customer, having made the purchase with you. Now is the time to really deliver. Regardless of your type of business, there are some general guidelines which, if followed, will make it easier to enhance the customer deliverables, and satisfaction as well.

## 10. Harvest Returns

You have put in a great deal of effort to get this far. The key now (as it has been all along) is to harvest multiple returns from your efforts. We will cover how to triple or quadruple the returns available to you by putting certain pieces in place throughout the process, so that you may then be able to harvest at this point.



## Part 2: The BD Strategies Navigator™

### Areas of Focus

The overall objective of this part of the program is to assist participants to generate enough qualified leads to achieve their goals for revenue and profit, both now and into the future.

In order to accomplish this, 2 key areas are covered:

- I. Foundations for Business Development Strategies
- II. Details of the strategies themselves

### Foundations for Business Development Strategies

1. Company Profile
2. Ideal client for you
3. Ideal client: them
4. Strategy Analyses

### 7 Strategies

1. Repeat Business
2. Gaining Referrals
3. Networks and Networking
4. Industry Business Associations
5. Joint Ventures and Strategic Alliances
6. Trade Shows, Conferences & Special Events
7. Public Speaking and Speaking at Events

Within each of these areas of focus there are key elements and questions to consider.

### Foundations for Business Development Strategies

#### 1 - Company Profile

Start with YOU! It is important to know where the company's key strengths lie. Further, where do the company's best options for expandability lie? What is the current product/service mix? Within your company's services, where does your unique advantage lie?

## 2 - Ideal Client for You

The ideal client for you is someone who wants, needs and appreciates you and your products and services. The ideal client is willing to pay you for your products and services and contribute to your success and allows you to give the best of you.

## 3 - Ideal Client: Them

To understand Ideal Clients better, we look at demographics & psychographics, as well as their behaviours and characteristics, so that we know where best to intersect with them. Possible needs and presenting symptoms are determined, as well as clarification on whether clients are driven by internal desires or external influence.

## 4 - Strategy Analyses

Knowing which strategy to use comes down to analyzing the industry sectors in which the company specializes. For your ideal clients, are attraction strategies or solicitation strategies more appropriate? Where, during the customer journey, are the best spots to intersect with potential clients? Calculating lifetime value of the client is important to know what the profitability of different client segments are. A tool, the customer differentiation matrix, assists to clarify what strategies might serve different client relationships better.

## The 7 Core BD Strategies

### 1 - Repeat Business

Build on the relationship of trust you have with your current clients. We cover how to turn a one-time client into a regular for the company. We address how to sell your professional services continually, as well as how to reactivate past clients.

### 2 - Gaining Referrals

Set yourself up for success by developing a referral mindset. We answer the question “what is a referral mind set?” Further, we unfold a series of methods to gain more referrals on a favourable basis.

### 3 - Networks and Networking

We'll look at the three types of core networks, what networking really is and how to develop an effective referral network. Many people dislike networking, feeling pressure to “sell themselves.” We identify strategies to address this process differently, reducing/eliminating the stress, and increasing personal effectiveness and satisfaction.

## 4 - Industry/Business Associations

How to be strategic in your approach, armed with the knowledge of your ideal Client, where they hang out and in which associations they participate. We establish how to use participation in Associations to maximize appropriate opportunities for ongoing client acquisition, as well as lead nurturing.

## 5 - Joint Ventures & Strategic Alliances

Joint venture marketing involves two or more businesses pooling their resources in a marketing strategy to increase the combined market share. This is often achieved by sharing risk and technical expertise. We review the three key elements of building effective joint venture BD initiatives.

## 6 - Trade Shows, Conferences & Special Events

Just about every industry has a trade show or conference somewhere in the world, where exhibitors and clients come together to promote or discuss their products and services. Together, we will clarify where you want to be positioned in the market, and at what level you wish to participate. Participants will learn the 15 key points about trade shows and how to attain the most from them.

## 7 - Public Speaking and Speaking at Events

Public speaking may be a strategy to implement when you have your ideal clients in the same room and you can position yourself as the subject authority. Public speaking done well leaves a positive impression of your expertise with your ideal clients and will often move them forward in the client acquisition process. Public speaking has many advantages but also disadvantages. Know when to use public speaking as a business development strategy. We will work through the public speaking process map to deliver powerfully during, and after the event.

# Learning Outcomes by Month

## Part 1: The Business Developer™

### Month 1 Learning Outcomes:

- Participants clarify where they currently fit in the current customer acquisition landscape, and how it has changed.
- They gain access to more easily identify their company's "unique advantage" in the market.
- They identify the clients who are a best-fit for their particular specialties.

### **Month 2 Learning Outcomes:**

- Participants determine the elements of making their value exchange obvious, and trusted.
- They learn how to build (or adjust) their collateral marketing materials and sales aids to support them in making the customer's win completely transparent and worthy of trust.
- In this step, participants start to unfold how to cultivate that relationship, right from the start. In both large and small deals, they gain clarity on the specific steps that, if taken, start to firmly develop that relationship.
- Participants define and work with the elements of enrollment, which constitute the first principles of effective customer acquisition.

### **Month 3 Learning Outcomes:**

- As this session is devoted to working directly with people, working through the implementation of their value proposition, the intended outcomes are more clarity on a compelling value proposition, and the start of what will eventually become their "Talking Tool".

### **Month 4 Learning Outcomes:**

- Participants learn how to develop relationships at sufficient depths to be able to ask, and gain answers to questions two levels deeper than your best competitors ever would or could go.
- They discover how to ask questions so deep that they are able to uncover the deeper needs, wants, desires or concerns of potential clients. This forms the raw materials for changing the basis of comparison away from price and onto "fit-to-need".
- Participants discover the importance of "completing the feedback loop" with potential clients, and it's effect on developing and confirming the relationship sufficient to do commerce.
- They learn a number of methods to achieve this objective, and identify which methods fit what situations in the client acquisition process.
- Further, participants gain access to expanding what's possible for their potential clients, including options and different approaches in support of client's movement forward in the process.

### **Month 5 Learning Outcomes:**

- Another direct working session on each participant's presentation, the intended outcome is that participants have not only have a compelling value proposition, but that it also manifests in a piece of marketing collateral that may be used when in live meetings, as part of a company introduction.
- In addition, participants are supported in clarifying both what the right questions might be for them to ask in the fact-finding interview, and how to provide feedback to clients about the information gleaned, in productive and powerful ways.

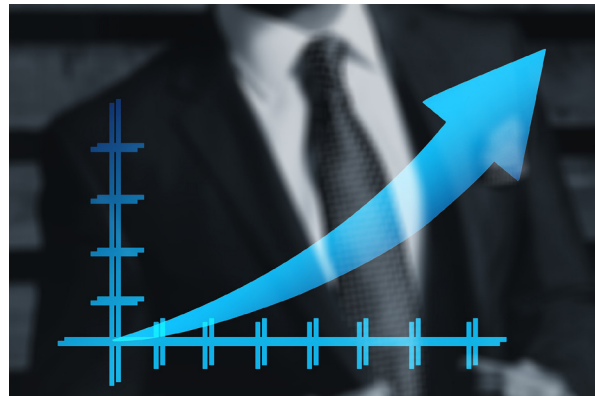
### Month 6 Learning Outcomes:

- Participants learn a potent approach to bring their expertise to the table – in advance of solutions presentation – that will take away any need to ‘close a sale’. They often speak to this step as a “game changer”.
- They clarify a method of unfolding solutions, tying each aspect to the stated needs, from the customer’s perspective, clarifying their gain, and building trust and confidence such that doing business together is an effortless extension of this step.
- Further, they review a number of key guidelines which, if followed, will make it easier to enhance the customer deliverables, client satisfaction, and ongoing repeat business as well.
- Finally, they discover how to triple or quadruple the returns available by putting certain pieces in place throughout the process, so that they may then be able to harvest at this point in the process.

## Part 2: The BD Strategies Navigator™

### Month 7 Learning Outcomes:

- Participants will get clear on their key strengths, strongest services for profitability, and best options for where expandability lie.
- They will also improve their clarity on their core uniqueness in the marketplace.
- Participants clarify which client groups form the best long term relationships with the company – who are the best clients to serve?
- They define the criteria on which to base the potential fit of clients to their company, making it easier to recognize best-fit clients for the firm.



### Month 8 Learning Outcomes:

- Participants learn how to evaluate clients – from each client’s perspective.
- They identify the core elements of effective client personas, and build personas that support their goals for business growth.
- Participants discover the core elements of several marketing analyses, in order to be able to identify the right mix of marketing and business development strategies for customer acquisition.

### **Month 9 Learning Outcomes:**

- Participants learn strategies to turn transactional customers into long term clients, right from the first sale.
- They identify methods to keep doors open for further work after the first deal is done.
- Further, they learn how to re-open dormant past clients, to generate more work.
- Participants discover the alarming facts about the difference between referral business and marketing from all other sources.
- They learn how to adopt a referral mindset, making the process of attracting referral business easier.
- They identify specific language that supports clients to “share them with others”.
- Finally, they clarify how to open doors with referred potential clients to increase chances of success.

### **Month 10 Learning Outcomes:**

- Participants identify the three types of networks they already have access to, on a favourable basis, and how to turn these into a “non-salesy” source of new business.
- They discover how to attract business rather than solicit it, increasing the number of potential clients who come to them.
- They discover the secrets to developing rich, meaningful relationships relatively quickly, to strengthen their ability to attract new business in ways that endear them to others, and have them appreciated in the process.

### **Month 11 Learning Outcomes:**

- Participants discover methods to strategically network into Business Associations without the need to be pushy or “salesy”.
- They establish how to use participation in Associations to maximize appropriate opportunities for ongoing client acquisition, as well as lead nurturing.
- Participants clarify the circumstances when joint ventures and strategic alliances work best in client acquisition.
- They learn about risk sharing and establish criteria for a strong joint venture or strategic alliance for them.
- They discover the three key elements of building effective joint venture business development initiatives.



### **Month 12 Learning Outcomes:**

- Participants clarify positioning in the market and at what level(s) to participate in trade shows, conferences and special events.
- Further, they learn the 15 key points about trade shows and how to gain the most from them.
- Participants clarify both the advantages and the disadvantages of public speaking – when it is a great idea and when to stay away.
- They learn when to best use public speaking as a business development strategy.
- They gain access to, and work through, the public speaking process map to deliver powerfully both during and after speaking events.