



SALES
INFLUENCE

Customized for:

YOU!

Sales Influence™

This iSpeak workbook is for use in the area of instructor-led training and development. It is designed to be practical and hands-on document to assist students in the learning process during a workshop and afterwards as a reference guide for review and continued learning.

ACKNOWLEDGMENTS

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Welcome to *Sales Influence!*

“There’s a way to do it better -- find it.” -Thomas Edison, inventor, salesman

Selling became a much more specialized profession during the industrial age. It was the first time in world history that we were purchasing items from hands that did not make the product. Up until that point, we would purchase from the local baker or blacksmith. Factories were now making it possible to mass-produce goods but at the cost of the customer relationship. In our best effort to maintain a human connection with the customers, factories began to employ sales professionals to nurture those relationships.

Sales Influence is the iSpeak workshop focused on how we communicate with our customers. You will be challenged to step outside your comfort zone and try on a few new communication skills. While the tools are extremely effective, your success using them will be based on how well you incorporate the tools into how you interact with others. Learn the techniques but then internalize the processes so you can own the tools. Make them your own.

Research shows that participants who interact during this course will gain a superior understanding of the course content over those who passively read the workbook or listen to the facilitator.

You bring to the class the skills necessary to be a great Sales Rep or Sales Manager. *Sales Influence* will challenge you to step outside of your comfort zone to learn new techniques. To become a skilled communicator in sales, you will need to challenge yourself to improve your skills, and that means fully participating in class exercises to sharpen new skills.

“Nothing improves until something changes.”

— Russ Peterson Jr., Sales and Leadership Author

The *information* and *inspiration* will be provided by your facilitator, but the *implementation* is the single most important factor in your *improvement*. During the next two days, you will be asked to role-play with others and with your facilitators. Only through your implementation will you internalize the skills required for success. In *Sales Communication*, we will provide you with the foundation and tools required to reach your sales goals.

Exercise: Course Expectations

What do you want to gain from the *Sales Influence* workshop?

1. _____

2. _____

3. _____

4. _____

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Unit One

1

Unit One: How We Connect

“Everyone communicates, few actually connect.”
– John C. Maxwell, Leadership Expert and Author

To communicate effectively in sales you need to provide logical information that taps into a sense of purpose and emotion. Then make sure it is all based on the foundation of trust with your customer. Your trust with a customer is built over time but will ultimately be dependent on your character as a person. Communicating your character in all that you do will create the strongest relationships and provide the ultimate persuasion you need to close the sale.

As a sale professional, your role is to come alongside your customer and help lead them through their buying process. As a leader, you will need to be influential at times to have your customer consider and select your proposals. Influence, like so many communication tools, can be used for good or evil. We will focus on noble persuasion through influence, which helps customers make the best selections to solve their business issues. The tools of influence can take on several forms. You will learn at least six methods for applying influence.

Unit Objectives

- Understand why action depends on emotion
- Reminder of the Sales Process
- Learn the four potential influence outcomes
- Learn six influence techniques
- Practice using different influence tactics
- Construct a bad-news email



Influence in the Sales Process

“When I make art, I think about it’s ability to connect with others, to bring them into the process.” – Jim Hodges, American Artist

In the iSpeak *Sales Discovery* workshop you were introduced to the Sales Process. One of the key items identified is that the Buyer Process came first. Then, as a sales professional it is your responsibility to align your Sales Process with the buyer’s buying process. The professional salesperson will always know the buyer’s current process phase and then assist them in moving along to the next phase. If done properly, the sale will almost close itself.

Since the salesperson will be assisting the buyer through their decision-making process, there will be times when using methods of influence will be helpful to the advancement of the sale. Influence should be wielded properly by always allowing the buyer to make his or her own decisions. Influence can be used throughout the process, but will most often become most critical in the Present and Complete phases of the Sales Process.

Buyer Process

- Define the Need
- Search for a solution
- Assess the options to choose from
- Justify the purchase (any risk in proceeding?)
- Evaluate the purchase for satisfaction

Sales Process

- **Prospect** to locate opportunities
- **Understand** the opportunities
- **Present** the aligned solution
- **Complete** the sale
- **Service** and follow-up after the sale



Potential Influence Outcomes

“The people who influence you are the people who believe in you.”
– Henry Drummond, Scottish Author

There are four potential outcomes in a situation when you apply influence. Two out of the four will achieve your goal, but only one of those will lead to easier future interactions.

Comply

This result will achieve the goal you set, but it has the chance of leading to poor performance and also difficulties in future interactions. For example, consider a child who doesn't want to clean their room. The parent says sternly, *“You'll do it now because I said so!”* If the child obeys, the room will get cleaned, but maybe not in the fastest or best fashion. This could also create a feeling of animosity toward the parent and more difficulties later. Compliance can also be the outcome with minimal negative feelings. When that happens, this result could also be called the “Logical Yes” result. In other words, the participant logically agrees in the action to be taken, and they don't really have any major negative feelings bad or good toward the next step. The feelings associated with this result are neutral (at best!) or quite often negative.

Commit

As the influencer, this is the result we all want to see. We achieve the goal we set and the person completing the task not only agrees with the direction logically, but they have positive feelings toward the task and us. They are doing it because they want to do it! The result has emotions tied to it, but the emotions are all positive. The emotion most often resulting from this type of influence is inspiration. People not only agree logically, but they also feel emotionally inspired.

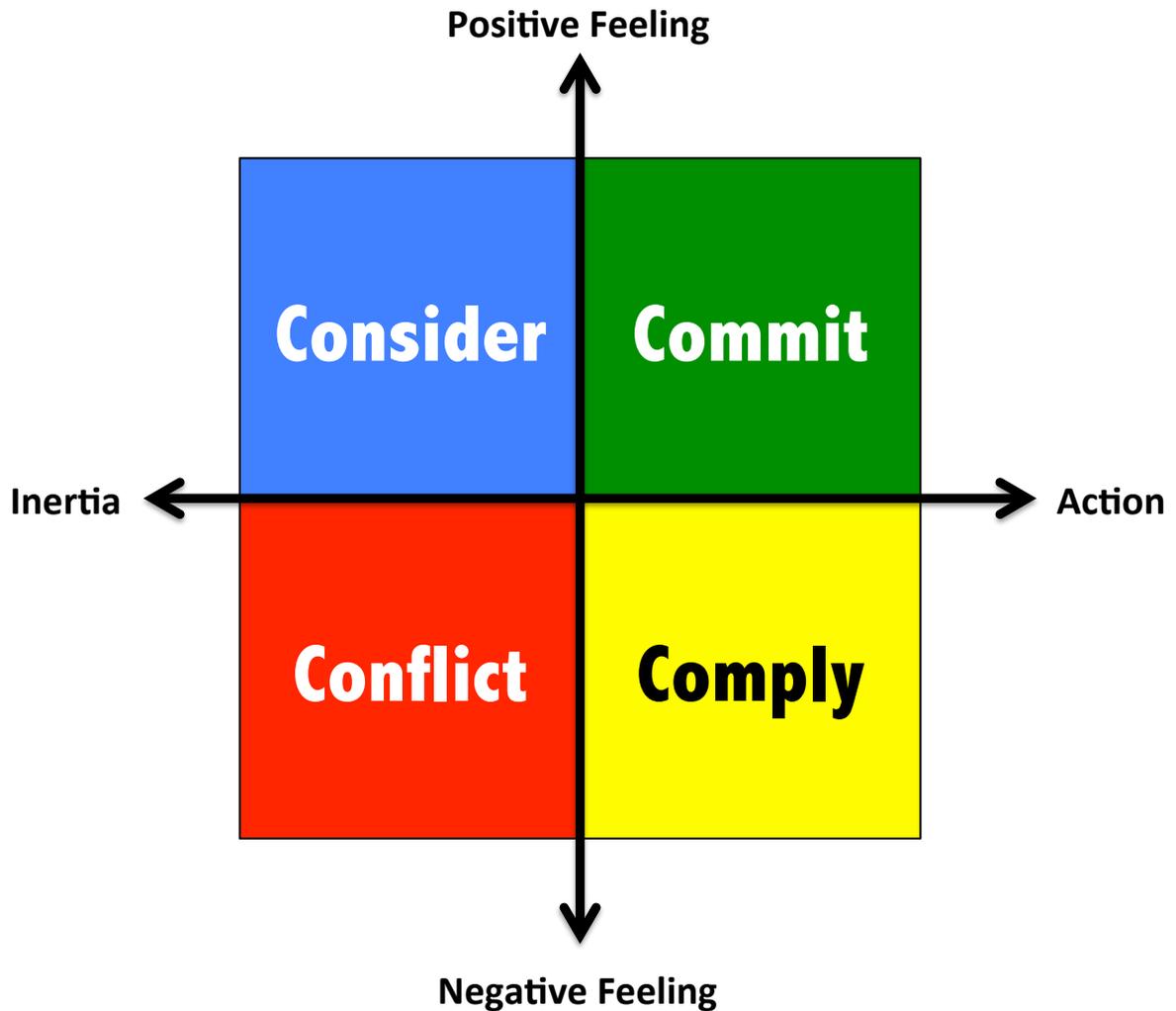
According to researchers Mark Goulston and John Ullman, the strongest form of persuasion to result in commitment is rational reasoning combined with inspiration.

Conflict

In this resulting state, the task is not going to get done. This leads you either back to the point of trying a different influence tactic or approaching the situation using one of five conflict response strategies (*compromise, collaborate, avoid, compete, smooth*). Since every situation has the possibility of resulting in conflict, thinking through the appropriate power base and influence tactic will always be our best way to avoid conflict. The feelings associated with this outcome are quite often negative. Those feelings can be repaired or improved by choosing one of the five conflict responses carefully.

Consider

This quadrant is when the logic of the argument outweighs the emotion tied to any other option. While the request is emotionally something to consider, it logically will not work. For example, if a request for a promotion to be offered the week of August 3rd but the store is closed that week for renovations and inventory, then the answer is “no” but it does not have negative feelings tied to it.



“Some people do have a more positive outlook, but almost everyone remembers negative things more strongly and in more detail. There are physiological as well as psychological reasons for this. The brain handles positive and negative information in different hemispheres.”

– Clifford Nass, *Author and Communications Professor, Stanford University*

Group Exercise: Using Influence Shortcuts

Read each situation below and choose which influence shortcut would be most appropriate. Then, document how you would implement the shortcut by recording what you would say.

Situation 1: Your customer does not activate the new games during the first week of the launch.

Which influence shortcut would you use? _____

Why did you select that method of influence? _____

How would you implement that? What would you say?

Situation 2: Your customer does not believe in the upcoming promotion and is not interested in doing it at their store.

Which influence shortcut would you use? _____

Why did you select that method of influence? _____

How would you implement that? What would you say?

Situation 3: Your customer does not want to comply with removing an instant game that is ending.

Which influence shortcut would you use? _____

Why did you select that method of influence? _____

How would you implement that? What would you say?

Situation 4: Your customer doesn't want to add any dispensers to their current display and they don't want to adjust their current product mix.

Which influence shortcut would you use? _____

Why did you select that method of influence? _____

How would you implement that? What would you say?

The Value of Trust

“If everyone is moving forward together, then success takes care of itself.”

- Henry Ford - American industrialist, (1863-1947)

Team members stay problem-focused

The absence of trust diverts the mental concentration and energy of a team away from its performance objective and onto other issues. The team becomes politicized. Communication becomes guarded and distorted. Alliances and personal agendas begin to take precedence over the team goal. Conversely, when trust is present, a collaborative climate allows team members to stay focused on a common goal.

Improves the quality of collaborative outcomes

When the members of a team trust each other they feel open to share negative information. If there is an issue with the task or project, a trusting environment will vet out the situation and deal with it. In addition, when teams trust each other, they feel open to taking risks because they know they are working in a safe environment. This level of trust leads to creative and collaborative solutions.

Leads to supporting each other

When one member of the team makes up for another member who may be struggling, the entire team succeeds. When a team is unified in its effort and trusts one another, the entire team can reach new heights because each member knows that the other members of the team are all ready to assist.

Promotes more efficient communication

Communicating candidly, confronting issues, and using each other’s resourcefulness are factors that affect climate and increase the likelihood of teams attaining goals. Trust improves efficiency by improving the team’s understanding of its own performance. It is the bond that allows any kind of significant relationship to exist between people. Once broken, it is not easily recovered.

The Four Elements for Building Trust

Trust is produced in a climate that includes four elements:

- **Honesty:** Integrity, no lies, no exaggerations
- **Openness:** A willingness to share and receptivity to information, perceptions, ideas
- **Consistency:** Predictable behavior and responses
- **Treatment:** Treating people with dignity and fairness

How to use Power and Influence

“Think twice before you speak, because your words and influence will plant the seed of either success or failure in the mind of another.” – Napoleon Hill, Author

Step One: Know your desired outcome

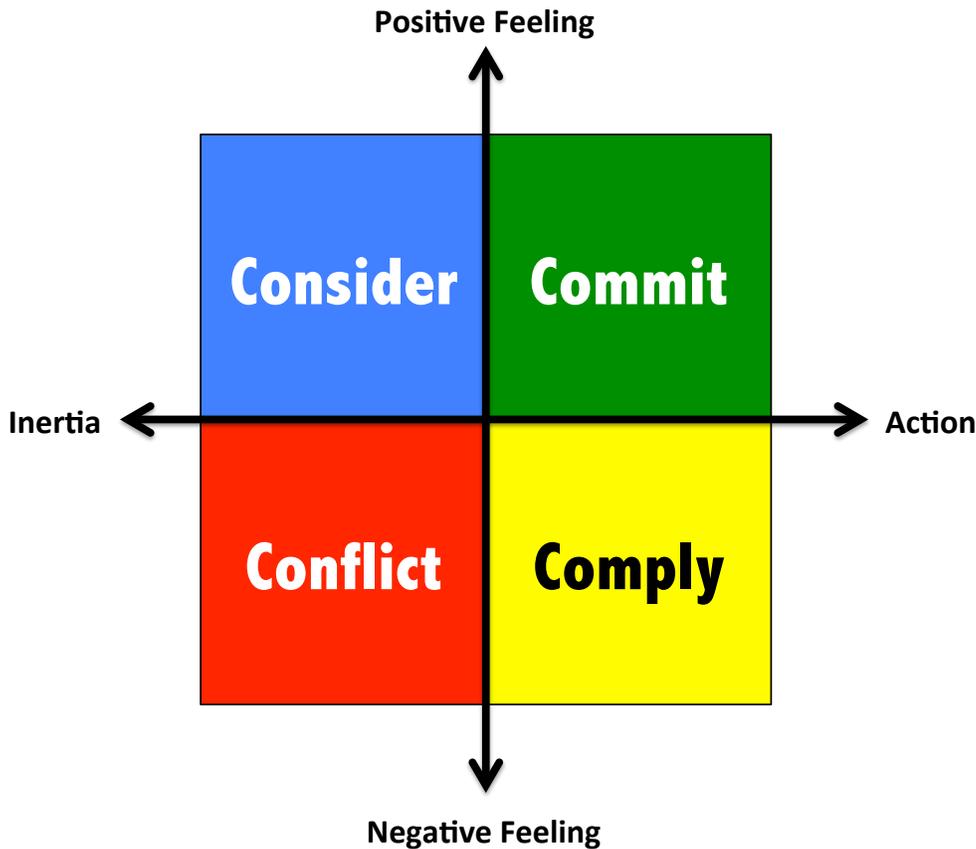
If you could select your outcome, which of the four would you want? Assuming you are attempting to influence to create an action, then you have only two choices, Commitment or Compliance. If possible, you will always want to achieve commitment. In some cases, when you know commitment will be extremely difficult to achieve, you may be willing to settle for compliance, if the negative feelings produced will not be too strong.

Step Two: Know your power base

What is the power base you are operating from? As a sales professional working with a customer, you will usually be working from a low power base. Without direct authority you may need to focus on the softer forms of influence.

Step Three: Select the appropriate influence tactic

Knowing the desired outcome and your working power base, you can then select the influence tactic that will be most effective for this situation.



Exercise: Example of how to use Power Base and Authority

Read the example below to see how you could use the power base and authority for influence.

1. Desired Outcome:

You want the customer to relocate the play station from its location near the bathroom. You'd like to move it back out near the front window where it used to be before they put up the Super Bowl Miller Lite display. You'd like to get it moved, but would also like to preserve the goodwill with the customer.

2. Power Base: EXPERT

This customer is fairly new to the retail industry. They recently purchased this store from the old owner. This is their first retail store. I have much more experience in retail than him. He sees me as the authority on all things lottery.

3. Influence Tactic: RATIONAL PERSUASION

Although the customer has been very proud and protective of the store since taking over, he/she has also been open to some new ideas over the past few months. He/She seems to approach all changes cautiously but is willing to try something if it has a low risk of failure / high risk of success.

4. What would that sound like?

“Hey Nelson, before I leave... I have a few suggestions for you to consider regarding the lottery. Over the years, I've worked with a lot stores and there are a few basic things I've seen with other customers that have always helped improve their lottery sales. Do you mind if I run some ideas by you?”

Item	Customer
1. Tennis Ball	1. A tourist in the U.S. for first time
2. 100 Toothpicks	2. Your boss
3. 50 ft. of rope	3. Energetic teenagers
4. Grilled cheese sandwich	4. A Police Officer
5. iSpeak logo pen	5. Good friend from work
6. Deck of playing cards	6. Your neighbor

Group Exercise: Practice using Power and Influence

The facilitator will place you into groups and you will have time to work on 6 situations. You will roll dice to determine the item and the customer. Then, determine the power base and influence tactic you would use to sell the item to them. Then, the facilitator will pull responses to the situations from the group. Participants will stand and deliver the influence tactic.

1 – Item to sell: _____

1 – Customer: _____

Power Base: _____

Influence Tactic: _____

How would you say it? _____

2 – Item to sell: _____

2 – Customer: _____

Power Base: _____

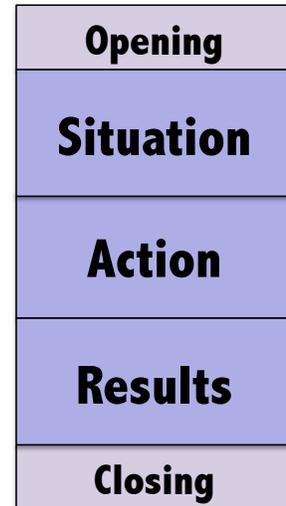
Influence Tactic: _____

How would you say it? _____

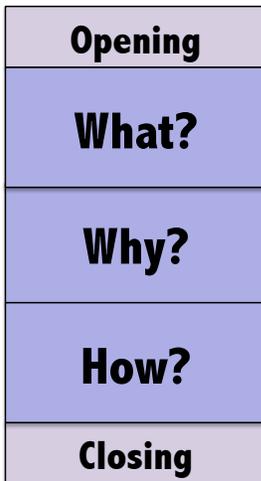
SAR – Situation – Action – Results

When you are speaking to an audience to review a project or event with an emphasis on actions and results, the Situation – Actions –Result format can be effective for reviewing corrective actions and their results. This template traditionally invests the first 60% of the presentation to defining the problem and the costs associated with it.

The transitional moment occurs when the speaker changes the topic from the issues and the costs, to the proposed solution and path forward. The remaining 60% of the presentation focuses on the solution and how it will be implemented. This format does not spend much time (if any) reviewing why or how the solution was selected. It is focused only on the implementation of the solution, not the justification of the choice.



What? – Why? – How?



When you are presenting future plans or even a review of an incident, the What? – Why? – How? format can provide a simple structure with impact. The first section is defining what the solution or new direction is for the audience. The second portion is where the speaker provides the supporting information for why the direction was selected. *(Unlike the Situation – Action – Results format where the reasons for the solution are not necessarily given.)*

This becomes the transitional moment when the conversation now turns from logical conversation into action! The final portion of the presentation is dedicated to how the team will implement and complete the project going forward. This format can also be used as a review method for triage work. For example, WHAT was the problem, WHY did we experience the problem, HOW are we going to fix and prevent it from happening again?

Good – Bad – New

This format can be used for a review of past performance or review of a project. The first portion reviews what has been going well so far. Then the bad is a summary of the obstacles or struggles that have been encountered. This portion does not need to be referred to as the bad. It can simply be called the difficulties, or the obstacles, or the issues being experienced.

The transitional moment occurs at this point as the speaker moves to the new direction or new changes that will be implemented to overcome these issues. In typical presentations using this format, the transition from the obstacles (bad) to the solutions (new) is intriguing and engaging to the audience. It draws them back with high interest, which helps prevent a dip in the audience’s attention.



UNIT THREE: COMMUNICATE YOUR MESSAGE

What did you do well in this exercise?

What did you find most challenging about this exercise?

How could you apply what you learned in this exercise to a real-world scenario after class?

Arguments with Appeal

“Trustworthy persuaders see the actual need even if it hasn’t been mentioned.”
 – Jay Heinrichs, *Rhetoric Expert and Author*

Once arguments have been migrated from the past or present to the deliberative consideration of the future, rhetoric provides three types of appeals that can be used to persuade the audience toward a solution. In Greek, these terms were called ethos, pathos, and logos. We will call them character, emotion, and logic.

Character Appeal (Ethos)

This type of appeal is powerful based on the character of the person delivering it. Have you ever wondered why some of your customers are willing to do just about anything you propose? In a sense, it falls in line with the expression in sales that people buy from people they like. In reality, they are buying because of your ethos, your character. They trust you. They like you. They believe in your character. Because of that appeal, they are willing to say yes.

“Have I ever steered you wrong before?”

“You and I have been working together for a long time. You know that your goals are my goals.”

Emotional Appeal (Pathos)

This appeal is based on emotion. By tapping into the current feelings or the expectation of future feelings, the customer is attracted to the proposal. As humans, it is hard to separate our emotions from any decision. We will make decisions to change when we are not comfortable or when we expect that the decision will make us feel better in the future.

“Think about how good it’s going to feel when the lottery is bringing in enough to pay your rent.”

“Can you imagine selling the winning Powerball ticket from your store! That would be awesome.”

Logical Appeal (Logos)

This is the appeal for Mr. Spock. While emotions seem to always play a role in our decisions, we all need to justify our decision in our mind. After we have made a few bad buying decisions based on feeling alone (new puppy, new convertible, extra large piece of cake), we remember how we felt later. We learn that there needs to be a logical and justified reason, no matter how trivial. We need that.

“The \$30 game in this area has been the best-selling game for other stores over the past 2 years.”

“If the 6 new dispensers are not helping improve your overall sales, we can always get them removed.”

Implement



SALES INFLUENCE

Implement to Improve

*“Knowing is not enough; we must apply. Willing is not enough; we must do.”
- Johann Goethe, German Writer and Statesman*

In life, to be a successful, you must have a plan. *Sales Discovery* has provided you with the information and the inspiration to improve yourself towards personal success; the final two steps are up to you. You must implement what you have learned and that will lead to improvement.

While the implementation phase can be the most trying, it is also the most significant. Without implementing the new knowledge that you have gained, improvement will be impossible. To assist you in the transition from classroom to real world experience, iSpeak offers this section to record how you will implement what you have learned in this course.



iSpeak After the Class

“We shall neither fail nor falter; we shall not weaken or tire... give us the tools and we will finish the job.” - Winston Churchill, Prime Minister of Great Britain



iSpeak University

At iSpeak University we are always adding videos, downloads and tools for you! iSpeak developers continually enhance our curriculum with modern tools and job aids. As the tools and videos are created, they will be added to the iSpeak University site. If you want a refresher on any of the iSpeak content, you can find it here!

<http://www.ispeak.com/ispeak-university>



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iSpeak on Twitter

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Our content experts not only deliver in the classroom, they also document their research and insights on our iSpeak Blog. Be a part of the conversation and post your comments and replies!

<http://www.ispeak.com/news.asp>



iSpeak YouTube Channel

Informative videos (and some just for fun!) of our instructors are placed on our YouTube channel. You can view a sample of some of our instructors to get a feel for the energy they bring to the classroom.

<http://www.youtube.com/ispeakdotcom>

Kaizen

“There is no best, there is always a better.” - Kevin Karschnik

Kaizen is a Japanese term that refers to a philosophy of continuous improvement. “Kai” means change and “Zen” means good. The term kaizen translated at its fullest means “the willingness to constantly pursue improvement one small step at a time.”

Throughout this iSpeak program you documented “Satori Moments” - information you indicated was important. The next step is to take this information, combine it with inspiration, and implement these techniques in the workplace and in your home life. This can be done in the form of a commitment you make to yourself – a promise to take action on what you have learned. Focus on only one or two commitments at a time. Trying to implement too many changes at once can be overwhelming, decreasing your efficiency and creating anxiety.



Exercise: Workshop Commitments

What positive changes do you want to implement from this workshop?

1. _____

2. _____

Signature

Date



Appendix

“This is not the end. It is not even the beginning of the end. But it is, perhaps, the end of the beginning.” – Winston Churchill, Former British Prime Minister

Appendix is a noun that means an appendage or a collection of supplementary material, usually at the end of a book. The appendix in an iSpeak workbook consists of tools that can be used after the class, resources and recommended reading materials

- Recommended reading list
- *Corporate Ovations*
- iSpeak Programs

Recommended Reading Materials

“The more that you read, the more things you will know. The more that you learn, the more places you’ll go.” - Dr. Seuss, Children’s Author

Sales

Cut the C.R.A.P. and Make the Sale, Russ Peterson, DC Press, 2003

Solution Selling, Michael Bosworth, McGraw – Hill, 1994

The New Strategic Selling, Stephen E. Heiman, Warner Books 1998

SPIN Selling, Neil Rackham, McGraw-Hill, 1998

Personal Improvement and Persuasion

Change Anything, Kerry Patterson, Grand Central Publishing, 2012

Influence: The Psychology of Persuasion, Robert Cialdini, Harper Business, 2006

Presentation Skills

Corporate Ovations: Your Roadmap to More Effective Presentations, Kevin Karschnik and Russ Peterson Jr., Discovery Tree Press, 2013

You’ve got to be Believed to be Heard, Bert Decker, St. Martin’s Press, 1992

The Articulate Executive, Granville Toogood, McGraw-Hill, 1996

Communication

Crucial Conversations, Patterson, Grenny, McMillan and Switzler, McGraw Hill, 2002

Conversational Magic, Les Donaldson, Prentice Hall, 1981

Messages: The Communication Skills Book, Matthew McKay & Martha Davis & Patrick Fanning, New Harbinger Publications, 1995

Getting to Yes, Roger Fisher and William Ury, Penguin Books, 1981, 1991

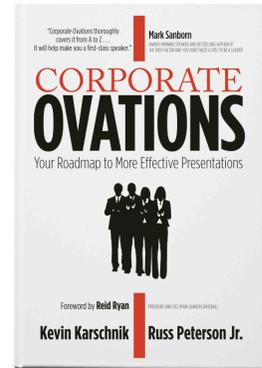
Corporate Ovations

“I only wish I had met them earlier in my career.” – Hernon Lopez, President Fox International

Who made the rule that all business presentations given in a corporate environment must be long, detailed and just plain boring? *Corporate Ovations* is the book to change all that. Without connecting to the audience, your presentations will never be their best.

In this book the authors teach you how to construct powerful and engaging presentations. Whether you are asked to speak for nine minutes on a project update or asked to deliver a keynote speech at the next industry trade show, you can prepare with this winning methodology.

Don't let your presentations end with a feeling of relief from your audience... learn how to end your presentations with a Corporate Ovation! Order your copy of *Corporate Ovations* today at www.iSpeak.com/store.



About the Authors

Russ Peterson Jr. and Kevin Karschnik have been professionally speaking since 1991. Kevin and Russ have founded two successful companies and also experienced corporate success working for Fortune 500 Companies.

Their workshops have been attended by thousands of students from around the world, ranging from Account Executives to Corporate Executives. Now, in a culmination of their career experience and their success in the classroom, the boardroom, and on the stage, these two experts share their secrets to take your presentations from receiving obligatory applause to receiving *Corporate Ovations*.



“This program was great – the best I’ve had - a day well spent! Kevin was excellent – would love for him to be my speaking coach. Very thorough content. Should be mandatory for all sales people.” – Trina Maull, Champion Technologies

“Russ is a fantastic presenter, everything from presentation skills, voice inflection, stories, supporting points, and anecdotes. Overall, he knows his stuff!!”

– **Scott Knoespel, Bimbo Bakeries USA**

iSpeak Workshops

“Quite simply the most effective sales training available in an over-crowded market place. The keys to assimilation of the learning are keeping common threads and knowledge of our industry throughout the entire curriculum. The customization and delivery to our sales team will assist our growth in the retail industry.” - Tom Stanek, Sr. Director Sales-Marketing, IGT

Presentation skills for today’s business professionals need to be customized to the individuals and their role. Our workshops are designed and delivered for maximum impact and behavioral change. iSpeak provides presentation skills training and tools for Sales professionals, Leaders and Individual Contributors. Whether you are an executive casting a vision for your company or a sales professional communicating to potential customers, we can help you prepare, develop and deliver that message.

Business Professionals

As a business professional you are asked to create and deliver messages to your peers and senior managers. These messages may be informative, such as a financial review, or they could be persuasive as in a request for a budget approval. In this program you will learn how to succeed at both. This class covers writing and delivering a presentation from beginning to end, with a focus on engaging openings and powerful closes. Students leave class with an SD card containing their classroom presentations.

CORPORATE
OVATIONS
MESSAGE
BUILDER

Sales Professionals

As a sales professional you will be presenting your ideas to customers in a persuasive manner. In this program you will learn how to uncover the data you need to effectively design and deliver a persuasive message that inspires action from your prospect. This class provides an opportunity for you to practice communication and questioning techniques by understanding a customer’s decision criteria, develop a presentation to meet their needs, and practice methods of persuasion.

SALES
DISCOVERY
SALES
INFLUENCE

Leaders

If you are a manager or leader in your organization, this program is specifically designed for you. In this program you will not only learn professional methods to deliver your message, you will practice your delivery with eight video-recorded presentations. After each speaking opportunity you will receive one-on-one coaching to enhance your skills. Whether you are speaking at a team meeting or to the entire corporation, this workshop is designed to develop your effectiveness as a leader.

LEADER
PRESENCE