HELPING CLIENTS SUCCEED
A Course Description
Training, and for that matter any solution, only provides value if it solves a problem you’re currently facing, or creates results that you’d like to see in the future. Helping Clients Succeed will only make sense if you think you can do better. There are a lot of questions you need to answer before you can help a client succeed. Getting those answers, or even knowing what to ask in the first place, can be challenging. Helping Clients Succeed teaches you what to ask, when, and how so you can get the critical information you need, including:

- What are the client’s key needs and real issues?
- Who are the decision-makers and what is their process?
- How do I discuss pricing and budget sensitively?
- Who else are they considering and how do I position my solution?
- How do I make a strong business case for my solution?
- How do I present my solution in a compelling way?

This program is specifically designed for professionals who have business development and sales responsibilities. Helping Clients Succeed not only delivers concepts that give a strong theoretical foundation for sales and consulting, it provides the critical thinking (IQ) and communication skills (EQ) required to do it in real life. Most sales training teaches you how to get around or avoid the dysfunctionality of the selling-buying process. The problem is that those techniques are dysfunctional themselves and lead to their own sets of problems. This course deals with the dysfunction head on and teaches how to address the dysfunction in relationship building and performance improving ways.

Helping Clients Succeed is sophisticated while remaining simple. Without sacrificing the realities of solid business thinking and a desire to build capacity for short as well as long term success, Helping Clients Succeed holds it’s own for delivering the strategies and skills for delivering high sales performance. Below is a general day by day “breakdown” of the course.

Day 1

Introduction
The objectives for the Helping Clients Succeed are:
- Increased Revenues
- Increased Margins
- Increased Leverage on Business Development Time
- Increased Client Satisfaction
Increased Repeat Business
Increased New Opportunities

To reach these objectives as consultants we want to create a solution that exactly meets our client’s needs. Anything less is likely to be of no value to our client, and therefore of no value to us.

We can approach the task in one of four ways:

1. **Tell** the client what they need
2. **Accept** without question what they say they need
3. **Guess** at what the client needs
4. Apply our experience and intellect and **Mutually Explore** to develop what they need

*Helping Clients Succeed* develops the rationale and skills to consistently create **Mutual Exploration**.

**Foundational Principles**
The business development dialogue is a balance between inquiry and advocacy. It requires exceptional critical thinking and communication skills. The better job we do of inquiry the more powerfully we can advocate. The Foundational Principles of the course help build the core competencies of asking effective questions to understand clients needs. The Foundational Principles are:

1. Intent Counts More Than Technique
2. No Guessing!
3. Questioning and Listening are Two Sides of the Same Coin
4. Peel the Onion
5. Structure the Conversation
6. Slow Down for Yellow Lights
7. Check Your Ego at the Door

These principles introduce the paradigm shifts, concepts, and practical skills that build the foundation of skills that will be applied to the business development process—**ORDER**.

**O**—The Opportunity
You can’t help someone succeed who has no perceived need. Consultants learn how to collaborate with clients to develop a compelling business case around a particular solution, or to agree that a strong business case doesn’t exist. This analysis permits both consultant and client to allocate resources to high probability situations and exit gracefully from low probability activities.

Consultants will learn to avoid premature discussion of solutions, and move instead to exploring the underlying business problems the
solution is intended to solve and/or the desired results the solution is intended to produce. Problems and results can be examined for evidence; evidence can be developed into economic consequences and impact, thus creating a sound business case for adopting a solution.

Day 2

R—The Resources
You can’t help someone succeed with insufficient resources. Consultants will learn how to qualify an opportunity in terms of time, money, and people. A distinction is made between price justification (“Are we getting the best price?”) and value justification (“Is this solution worth the investment?”) Particular emphasis is given to establishing a realistic expectation on the part of the client on what is required financially to solve the problem or achieve the desired results. Consultants will role-play predictable client responses to the question, “Have you established a budget for this project?”

D—The Decision Process
You can’t help someone succeed who can’t make a decision. Consultants will learn to decipher:

<table>
<thead>
<tr>
<th>Steps</th>
<th>Decision</th>
<th>When</th>
<th>Who</th>
<th>How</th>
</tr>
</thead>
<tbody>
<tr>
<td>What are all of the steps?</td>
<td>What decision gets made in each step?</td>
<td>When will they decide?</td>
<td>Who is involved in each step?</td>
<td>How will each decision maker decide?</td>
</tr>
</tbody>
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Since often the criteria for making the decision are tactic and implicit, consultants will learn how to make them conscious and explicit. Once consultants learn whom they must see, they learn how to get access to those they must see to develop a compelling rationale that is in the client’s best interest. Consultants will also learn advanced questioning techniques that keep the focus on the issues and not on the solution, how to deal with tough questions from the client, and how to answer the real question or concern.

Day 3

E—The Exact Solution
Proposals don’t sell, people do. Consultants will learn how to present the evidence and impact of a solution, within the resources allocated, and matches the expectations and needs of decision makers. Consultants will learn to gain agreement and present a “What If…” oral presentation. They learn to position the written proposal as a confirming rather than a persuasive document. When the solution is presented, consultants learn to surface and resolve clients concerns (price and non-price) and to obtain a
yes or no decision, rather than an indefinite “maybe”. Consultants will learn to close the business.

**R—The Relationship**
Consultants learn what to do when the client says “yes”, “no”, or “maybe” to ensure there is a productive, ongoing relationship.

**Account Development**
Consultants learn how to initiate new business with current clients and prospective clients.

**Communication Tools**
Consultants learn how to listen to the structure as well as the content of client statements and then ask questions that create greater clarity and mutual understanding.

**About the Architect of Helping Clients Succeed**
Mahan Khalsa is a world-renowned expert in business development. He graduated with honors in economics from UCLA, and has an MBA from Harvard Business School. The hallmarks of Mahan are insight, respect, intellect, and a down-to-earth, pragmatic approach to business. He is an expert in global best practices of sales and consulting, and has applied those findings to some of the world’s largest and most successful organizations including Arthur Andersen, Microsoft, Walt Disney, and William M. Mercer. As an entrepreneur, he has built and sold several successful companies. Mahan is author of a best-selling book, *Let’s Get Real or Let’s Not Play*, and *Asking Effective Questions*. The training version of Mahan’s methodology, *Helping Clients Succeed*, is taught around the world. He and his wife, Mahan Kaur Khalsa, live with their two dogs, Brio and Guy, in the beautiful Rocky Mountains of Utah near Sundance Resort.

*Helping Clients Succeed* makes good salespeople great. Discover how in this three-day workshop delivered by Franklin Covey’s to consultants from the Sales Performance Group.