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# Southeast Association of Facilitators

**The Secrets to Selling and  
Marketing Facilitation Services  
For Internal and External Facilitators**  
March 11, 2011

Presented by  
**Michael Wilkinson, CMF**

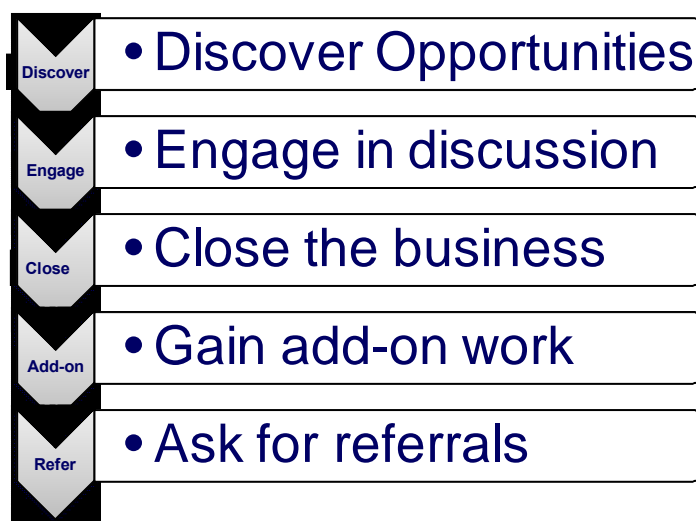


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## Overview

At the March meeting of the Southeast Association of Facilitators, Michael Wilkinson from Leadership Strategies presented a workshop titled, “The Secrets to Selling and Marketing Facilitation Services For Internal and External Facilitators.” The slides from the presentation are available in a separate document. This document contains notes from the breakout session in which participants brainstormed and used a rotating flipchart approach to identify strategies in the following five areas of sales and marketing.



The items from the rotating flipchart session are presented below. Those items with asterisks (\*) were the ones identified through the rotation process as most helpful. Those strategies highlighted with the letter (I) are particularly applicable to internal facilitators, those who work inside an organization and facilitate primarily for that organization. Items in *italics>* represent words added by the documenter for clarity.

Also included is a brief summary of the presentation.

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## A. Discover Opportunities

*How to locate opportunities or increase the likelihood that people will contact you when opportunities present themselves.*

### Communication

1. Tell stories\* (I)
2. Ask questions about what's not working – “How can I help”
3. Optimize use of social networking and blogging
4. Use social networking
5. Write articles
6. Listen in meetings
7. Don't ask stupid questions
8. Respond to RFPs

### Conferences and Courses

9. Connect with people at the conference
10. Identify speaking opportunities at conferences
11. Present at conferences
12. Signup for Leadership Strategies course

### Information Gathering

13. Research the trends\*
14. Survey *your* customers
15. Know the industry
16. Interview your successful colleagues
17. Search job boards
18. Review your past work to look for opportunities

### Networking

19. *Do* professional networking
20. Share what you do with everyone and ask if they *have a need* or know anyone *who does*\*
21. Conduct netweaving
22. Find gate openers
23. Build relationships with leads and decision makers (I)

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## **Volunteering**

24. Volunteer for opportunities
25. Use evaluations to offer volunteer services
26. Join professional associations and volunteer
27. Serve on boards

## **B. Engage in Discussion**

*Once you are aware of an opportunity, how do you engage the potential client in conversation?*

### **Contact**

1. Call them
2. Get on the executive/management agenda
3. Greet them like a person not a prospect

### **Events**

1. Host a lunch (a launching lunch)
2. Conduct a focus group with clients (a mixer)

### **Experience and Success**

1. Connect your experience to their business
2. Relate industry experience
3. Give a satisfied customer reference list
4. Share successes
5. Share their successes

### **Invitations**

6. Invite to a SEAF meeting (I)
7. Invite to another meeting
8. Volunteer for opportunities (I)

### **Needs and Outcome**

9. Ask what the needs are and why\*
10. Research and ask pointed questions
11. Ask open-ended questions about needs, follow-up questions (to prove you are listening – “peel back the onion”\*)
12. Share list of key learnings and get input on what they want

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13. Point to the outcome (based on research)
  14. Question client regarding understanding of facilitation

### **Problems**

15. Understand challenges

### **Other**

16. Utilize social media
17. Provide downloadable assessment

## **C. Close the Business**

*How to ensure you gain the business once you have identified an opportunity and made contact.*

### **Ask**

1. Ask for the business\* (I)
2. Use the presumptive close
3. Use the take-away close

### **Constraints**

4. Understand budget
5. Understand what additional resources are available

### **Decision Maker**

6. Make sure you are talking to the decision maker\* (I)

### **Execution**

7. Just start helping them\*
8. Honor commitments

### **Goals and Benefits**

9. Facilitate discussion of what success will look like
10. Tie goals to benefits – verbalize
11. Ask what *are the* rewards, benefits when you get there
12. Seek incentives (BOGO)

### **Needs and Barriers**

13. Don't provide a solution until you know what the need is (listen)\* (I)
14. Gain agreement on the needs

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15. *Identify* what barriers exist and discuss how to overcome

### **Proposal and Contract**

16. Prepare a proposal
17. Describe competitive advantage (*the* “So what?”)
18. Offer creative options; demonstrate flexibility
19. Ensure they understand what you will deliver
20. Make sure good fit on both sides
21. Sign a contract/handshake

### **Timelines**

22. Agree on decision timeline
23. Understand and honor their timeline

## **D. Gain Add-on Business**

*Strategies for acquiring additional business from an existing contact to be done for that contact.*

### **Attitude**

1. Adapt partnership mentality (I)

### **Capabilities**

2. Make sure they understand *the* value brought and make sure they know what else you can do

### **Communication**

3. Eavesdrop tactfully; listen (I)
4. Keep in touch (call, write, Facebook)
5. Show and tell with celebration
6. Add to email list, newsletter list
7. Complete “white paper” summary for their board report
8. Work up, sell up, work at highest level; do executive briefs\*

### **Follow up**

9. Look for cycle to follow up (I)
10. Provide survey
11. Follow up with decision maker; make sure satisfied

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## **Opportunities**

12. Develop next steps and look for opportunities\* (I)
13. Find other parts of the plan or project that you can help with\* (I)
14. Replicate in other environments
15. Keep track of challenges and wishes (I)
16. Create residual (I)

## **Products and Services**

17. Do/be excellent
18. Innovate – new products and programs (I)
19. Check for customization (I)
20. Build multiple levels (I)
21. Provide technology solutions and updates (webinars)

## **E. Ask for Referrals**

*Gaining referrals to other organizations or other areas within the same organization*

### **Ask**

1. Ask if someone else needs it (I)
2. Listen for cross-team engagement; ask for referral
3. As part of session debrief / evaluation, ask for referral
4. Ask what other parts of organization *could use* help
5. Describe perfect client

### **Events**

6. Invite to dinner (or a training or SEAF) and invite a colleague
7. Speak at an event
8. Go to their professional events
9. *Have* poster session at their professional events

### **Follow-up communications**

10. *Have* follow-up communications
11. Use social media (e.g., LinkedIn) for recommendations, introductions, interest groups
12. Blog

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## **Incentives**

13. Offer incentives for referrals
14. *Give* gift: “my services to someone who needs – in client’s name”
15. *Ask*, “Do you have a charity you like?”; give services there
16. Provide *incentives*

## **Networking**

17. Carry business cards and share elevator speech

## **Partner**

18. Get a referral partner to sponsor you

## **Positioning**

19. Talk long-term from day one; ask

## **Products and Services**

20. Provide excellent service that generates referral (I)
21. Be a problem-solver

## **Testimonials**

22. Get testimonials

## F. Top Ten Strategies from Michael

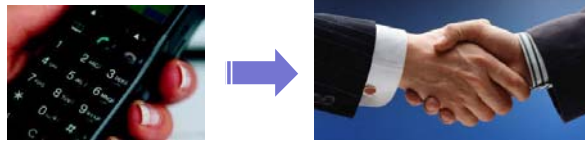
*These are brief descriptions of the ten strategies shared by Michael during the presentation.*

### 10. Nothing Happens Until Something is Sold

- ❑ Spending time developing your service, designing a brochure, identifying the target market, etc. is important. However, you are not in business until there is business.
- ❑ Therefore, for the first couple of years, every day I was in the office, I had to make 20 phone calls FIRST, before I did anything else.

#### #10 - NHUSS

## Nothing Happens Until Something's Sold!



### 9. Lead Generation not Brand Awareness

- ❑ Companies like Coke, Nike, and Citibank can afford to spend dollars on making people aware of their brand. However, for smaller companies trying to pay the bills each month, every dollar spent on marketing should be for lead generation not brand awareness.

#### #9 – LG X BA

## Lead Generation NOT Brand Awareness.

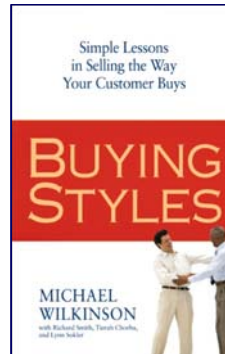


8. Sell in their style, not yours

- The bait has to taste good to the fish, not the fisherman. As Michael’s book **Buying Styles** teaches, all of us have a natural selling style, and when our selling style matches the buyers buying style, good things typically happen. However, when we don’t adapt our selling style to the buyer’s buying style, we make it much more difficult for the sale to happen. Know the four basic buying styles, how to recognize them, and how to adapt to them.

#8 – SITS X Y

Sell in THEIR  
Style  
Not Yours!



7. Stay out of Column B

- In a poker game, the person who comes in first is the winner. However, the person who comes in second is the person who dropped out first and lost the least amount of money. In the same way, in a competitive bid situation, the person who comes in second is the person who didn’t bid. All too often, clients have already made up their minds whom they will use – that’s their Column A. They are looking to you to provide a proposal that fills in their Column B, so they can prove they have looked at more than one option.
- So called “good” opportunities are often Column B. Recognize the typical Column B signs, and run far away: signs such as their wanting a price in a hurry with no interest in learning about your offering; or their not allowing you to speak to the decision makers.

#7 – SOOCB

Stay out of Column B!

Criteria	COLUMN A Who We Want	COLUMN B Everyone Else
Industry expertise		
Process experience		
Local availability		
Cost		
Other factors we make up		

## 6. Ask for Referrals

- ❑ In seeking referrals, have your clients visualize the benefit they have received and then ask who else could gain from having this same benefit.
- ❑ Ask for more than you want. When requesting referrals set the expectation that you are seeking three or four; you just might get it; but it also increase the likelihood that you will get one or two.

### #6 - AFR

## Ask for Referrals.

? 4 \$

## 5. Why Us ... Not About Us

- ❑ Brochures, emails and websites far too often answer the question, “Why Us.” Instead, according to Jaynie Smith, author of **Creating Competitive Advantage**, the focus should always be on “Why Us” by identifying your competitive advantages – things that matter to the customer – and ensuring you focus on these in all of your communications.

### #5 – WU X AU

Why  
Us  
NOT  
About  
Us!

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Why Leadership Strategies?  
Leadership Strategies helps clients build an effective strategic meeting, with focus on every responsibility, setting that the firm based upon address the most important issues in their business.

Thank you for the opportunity to be part of The Strategic Process in your course. Our pr practice, leadership, & strategic experience / We bring exceptional & are excited to bring strategic team skills, techniques, and processes learned in both the professional and personal life, to your "The Client Value Statement"

1 of 2  
View additional competitive advantages

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#### 4. Customer Centric Selling

- What do you say after you say hello? You get people talking about their needs. The **Customer Centric Selling** approach which Leadership Strategies uses focuses on what CCS calls solution development prompters based on the title of the person with whom you are speaking. The process engages the person in conversation quickly and allows you to tie your service to their need.

### #4 – WDISAH

## What Do I Say After Hello?



When we've talked with COOs about strategic planning, they often speak about two challenges in particular. They say their teams waste a lot of time debating over terms and process and that their teams spend a lot of time develop plans that end up sitting on someone's bookshelf.

Are you seeing these issues or different ones?

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#### 3. Newsletter to Grow Your Database

- In 2002 our marketing database had 2000 people. After learning from a computer company that their strategy for getting their database to over 20,000 was to create an email newsletter which people could sign-up for from their website, we implemented the strategy. Today our database in over 25,000.

### #3 – YNN: YDBB

## Your Newsletter: Your Database Builder



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## 2. 5 Ps to Define Needs

- To ensure that we understand what the client needs and why, we use our 5 Ps process
  - Purpose – Why are you doing this and how do you define success?
  - Product – What do you want to have when you are done?
  - People – Who needs to be involved?
  - Probable Issues – What are the issues that will need to be addressed?
  - Process – What steps should we take to create the products that will fulfill the purpose given the people and the probable issues?

### #2 – 5Ps

Use the  
5 Ps  
to define  
the Client  
Need



## 1. Webinars

- Webinars have been a valuable source of leads and real business, with nearly a quarter of a million dollars from this source alone in the past 12 months.
- Offer real value (not just a thinly veiled sales pitch) and have an attractive offer to move people through your sales funnel.

### #1 - W

## Webinars!



**Welcome to our Webinar!**

***The Introduction to Facilitating Groups***

**In this fast-paced, ninety-minute session you will walk away with at least a dozen techniques for...**