

A supplementary guide to the Sales Presentation Template

***These notes and the sales presentation template is tailored for Human Resources Development (HRD) professionals. However, many of the slides in the template can be used for sales presentations to individual business leaders as well.**

Congratulations on landing a meeting with a prospect!

You got your foot in the door by getting your value proposition across and leaving a great impression. Now it's time to make your sales pitch, beginning the process of securing the prospect as a client.

For this meeting, clear and concise communication is key. HRD professionals want to know what they are getting for their leader(s): the process and the results.

Because it's only the initial meeting, you cannot cover every single detail. Instead, it's your job to impart your coaching knowledge and the proven process that translates to measurable results. The sales presentation deck will serve as the conversation facilitator to help you get this message across.

Luckily, you have a Sales Presentation Template waiting for you in this folder that you can use to craft and deliver a well thought out pitch.

The Sales Presentation Notes below benefits as a supplementary guideline to the Sales Presentation Template. Use these notes while crafting your pitch and before your delivery. And feel free to make changes to the template design and/or content.

Things to consider:

- The slide deck should not be a step-by-step guide with minute details. Remember, it is best suited as a conversation facilitator. If the prospect wanted to only read about what you provide, they would not have requested a 1-on-1 meeting.
- During the meeting, stick to the slides! They are there for a reason. Your slides are the template for the story you are pitching to the prospect. If the conversation gets off topic, refer back to the slides to continue your pitch. A story is read best from beginning to end, not by jumping from chapter to chapter.

Presentation Outline

The overall conversation you want to aim for is simple:

1. What are your needs?
2. Here's a process that will solve it, let me explain it to you.
3. The results are measurable
4. Let's discuss this further, what questions do you have?

You can use our presentation template to structure this conversation:

Slide 1. Title Slide

Slide 2, 3. Why Leadership Coaching for Leadership Development?

Slide 4. Leadership coaching to improve effectiveness of your leaders: Question 1 / 2 / 3

Slide 5. Leadership coaching to improve effectiveness of your leaders: Question 1 / 4 / 5

Slide 6. 360 Feedforward Coaching Process - An Overview

Slide 7,8. 360 Feedforward Coaching Process - Phase 1, 2

Slide 9. Why Involve Coworkers?

Slide 10. Why Involve Coworkers? - Perception Change Is Key

Slide 11. The Results Are Measurable

Slide 12. Any More Questions?

Slide 1 - Title Slide

Before you get started, KYP - Know Your Personnel

Selling coaching services is a needs-based selling process. Hereunder is an overview of what we have seen the most important needs of potential clients to be. As noted, for this Sales Presentation Template we will be focusing on human resource development professionals.

Human Resources Development (HRD) professionals

Typically, HRD professionals have the opportunity to say NO but don't really have the power to say YES to sourcing coaching services since the business leaders manage the budgets and the people. HRD is really the qualifier to open the door to sell coaching into the organization. The most important needs of HRD that we leverage in the sales process are:

- **Mass-produce leaders**
Through HR business partnering (i.e. HRBP) HRD facilitates the development of (measurably) more effective leaders. Much of that has traditionally been done via (online) training and might be measured with metrics such as training hours or bench-strength / succession depth.
- **Improve people process**
As part of delivering quality HR processes and services to the organization, HRD aims to provide (coaching) services that are high quality, consistent, transferable, scalable, and efficiently delivered throughout the organization.
- **Trusted Advisor**
HRD professionals want to be recognized as 'trusted advisors' by their internal clients and during performance appraisals which all impacts their career advancement as well as the overall HRD brand. Such includes HRD's interest to acquire coaching knowledge, certifications and experience which all adds to their trusted advisor brand in the organization (and beyond).

Global Coach Group

Based on the above Global Coach Group continues to put a lot of effort in and emphasis on results, process, and brand. Therefore, you hear us and all our most successful coaches talking about:

- Trusted Results

- Guaranteed and measurable leadership growth
- Trusted Process
 - 360 Feedforward Coaching process
- Trusted Brand
 - Global Leadership Coaching programs
- Trusted Globally
 - Leading Global Coaches Network
 - 1 million leaders have experienced the success of involving coworkers in their leadership development

Slides 2 & 3 - Let's Discuss: Leadership coaching for leadership development

Objective: Understanding the client's needs

Many people have many different definitions around what leadership coaching means. This means coaching is an opaque and possibly vague service proposition and since it is not well defined you want to understand what the client's mental model around coaching is. You should allocate 10-15 minutes for this discussion, using the guidance and questions hereunder.

1. What is your experience with Leadership Coaching so far?
2. Why are you interested in Leadership Coaching at this point in time?
3. How would you ideally want to use Leadership Coaching in your organization?
4. What results & benefits do you expect?
5. Do you want results to be measurable and guaranteed?

Slides 4 & 5 - Let's Discuss: Leadership coaching for leadership development

Objective: Understanding the client's needs

To effectively sell coaching, follow a needs-based selling process that focuses on making a business case with the client without being too overt about it. Use the questions below to have the client address their organization's challenges and needs. When the client begins to answer each question, it serves as self-reinforcement that their (organizations') challenges and needs require a solution.

1. What are the main leadership culture and behavioral issues that you like to address in your organization (or for this leader / group of leaders)?
 - What are leaders specifically doing or not doing that you like to address?
 - What leadership behaviors should leaders do more of?
2. What has your organization done over the last three years to address this?
3. Have you followed up to measure if & how leaders have become measurably more effective as a result of that (ref. Q2)?
4. How valuable would it be for your business performance if your leaders would be measurably more effective in the behaviors you just mentioned (ref. Q1)?
5. If we could guarantee to measurably grow leaders to be consistently more effective in these behaviors (ref. Q1) would that be of value to you?

Slides 6, 7, 8 - Intro to the 360 Feedforward Coaching Process

Objective: Concisely explain the 360 Feedforward Coaching process

Allocate around 5-10 minutes for this discussion, using the guidance hereunder.



The 360 Feedforward Coaching process starts off with **phase 1 Committed Start** followed by the Grow phase.

The coach works with the leader to select 2 high-value areas for growth that are important to them and the organization. We determine this based on some assessments. Once the leader

has committed to which behaviors to improve and selected the relevant coworkers to support in the development journey, alignment with and confirmation from the manager is required.

Once the coworkers are onboarded, the leader takes the process forward to the **Grow phase**, which is a future-focused Monthly Feedforward Cycle. This is a highly time effective 3 steps process:

1. **Ask** for future-focused suggestions to improve in your growth areas (don't forget to thank people for their valuable input!)
2. **Reflect** on the suggestions given and create a monthly action plan
3. **Act** on the suggestions given by sharing and implementing the action plan (remember to follow up with coworkers to check whether the change is visible to them)

The Grow phase also includes quarterly measuring leadership growth. We all know that you can only manage what you can measure. Therefore, each quarter, we will ask the leader and the coworkers how much change they have seen in the past 3 months. This -3 to +3 measurement will give you clarity on the return on your efforts by answering the question, "How much more effective has the leader become in the eyes of the coworkers." Their perception is reality.

The objective of the 360 Feedforward Coaching process is threefold:

- First, grow as a leader by becoming measurably more effective
- Second, to transfer this leadership growth process to the leader so that they can continue to develop themselves
- And third roll it out to their teams where they become better at coaching their team members.

Although the engagement is for a fixed period of time, we will provide your leaders with all the resources they need to continue to be more and more successful moving forward.

Slide 9 - Why Involve Coworkers?

Objective: Concisely explain the importance of involving coworkers and why our process differs from others for this very reason

After explaining the 360 Feedforward process, the most common questions that arise (almost every single time) are around the involvement of coworkers. Not only leaders, but HRD may have hesitations about this holistic approach to leadership growth. It is your job to sell your client on the importance of involving coworkers. Below is an answer you can use to the following question:

Is coworker involvement optional? Can't I just work with my coach? (OR Can't our leaders just work with you?)

If results matter to you, then involving coworkers should matter too. Our expert coaches use a holistic approach that builds on conventional coaching methods by involving coworkers. This has proven to deliver more than 2X greater impact on overall growth, as well as being more connected to reality. This leads to better results, quicker.

Two things to consider here:

1. Who decides whether your organization's products are effective or not? Your organization or your customers? Of course: your customers. The ones who consume, decide. **Their perception is reality.** *This will be explained in the next slide.*

The same is true for leadership. Who decides if a leader is effective? The leader or their coworkers? Again, the coworker's perception is the leader's reality.

2. Based on our experience and global research conducted with a million leaders, we know that 95% of leaders who involve coworkers in their leadership development get better. The same research points out that leaders who do not involve coworkers in their leadership most likely do not get better in the eyes of their coworkers.

Slide 10 - Why Involve Coworkers? - Perception Change Is Key

Objective: Delve deeper and sell to the client that perception change is absolutely critical for leadership growth and that's why 360 Feedforward is the best process to bring about results

Why is perception change important?

I am sure you know the answer to this question.

Which (software) service upgrade gets better customer reviews (or another analogy that is applicable for the specific organization you are selling to)?

The upgrade that was designed and launched without involving customers, OR the service upgrade that was designed involving customers and then clearly communicated to them.

Of course the last approach is more effective by far, that is why companies work that way.

The same holds true in leadership behavior change (a leadership service upgrade)

Most people believe that changing behaviors is the key to becoming an effective leader. But behavior change is only the beginning to becoming more effective. Changing the perception associated with these behaviors is much more important.

Because coworkers' perception of a leader is the reality of where the leader stands.

Just because you change a behavior(s) does not mean you become a better leader. If your coworkers don't perceive your changed behaviors as more effective, then you have only impacted yourself, whereas leadership is about impacting them!

To dive deeper, when you want to change a behavior, in essence, it is quite simple. **You** go out and do it. It is a change that **you** can personally make. What's more difficult is changing the perceptions **your coworkers** associate with that behavior because it is *not something you readily control*. And one of the reasons is because once perceptions are formed around a behavior, that is what people look for and readily expect. It is how they have been conditioned **by you**. Coworkers are not actively looking for changing their perceptions. So the only way to change and become a more effective leader is to change these behaviors **ALONG WITH** the associated perceptions.

Though changing perception might be challenging, this is our expertise.

Our coaches and coaching process are most effective in supporting and guiding you toward success. This is backed by our 95% success rate and 98% satisfaction rate.

Our coaches focus not only on helping you change key behaviors, but at the same time involving coworkers to update their perceptions around those changed behaviors. All to make sure that your coworkers' perception of yourself as a more effective leader becomes a new reality for you **AND** them.

Slide 11 - Measurable Results

Objective: Finish with impact by showing the guaranteed results of the 360 Feedforward coaching process.

It's plain and simple, we studied 11,000+ leaders that involved their coworkers in their leadership development and found that 95% of them measurably improved their leadership effectiveness.

Slide 12 - Questions?

Objective: Begin further discussion and answer any questions they may have.

As you enter into a time of Q&A concerning the 360 Feedforward Coaching process, keep in mind that questions may come from a place of curiosity or from a place of concern. Help yourself by keeping your answers upbeat and the conversation bright. Use the list of common questions and suggested answers hereunder. Depending whether you are selling to the leader being coached, their manager or HRD you can adapt the answers hereunder accordingly.

Question 1: How much time will this take from me as a leader?

Outside of our coaching sessions of 2 hours per month, you will likely spend an additional 2 hours on this. That is 4 hours per month. Most leaders I work with work close to 50 hours a week, adding up to around 200 hours per month. 4 hours would be 2% of those working hours. Investing 2% of your time in leadership development, becoming visibly more effective as a leader, and being recognized for that: would that be a worthwhile investment? This always gets a resounding YES .

Question 2: How much time will this take from my coworkers every month?

Less than 5 minutes. And they will be happy to provide you with suggestions that will contribute to the effectiveness of your collaboration, which directly affects their life at work.

Question 3: How many coworkers should I involve?

6 - 12 is a good number. These are typically your team members, your manager, and a few peers.

Question 4: Who chooses the leadership growth areas?

Based on the feedback from your coworkers and your manager, you select the areas in which to improve. You will then align with your manager, to ensure these areas are of priority to both you and the organization. I will help you in the process of picking the right areas to develop and getting alignment with your manager. No worries there.

Question 5: Why does the coaching process take so long?

I am a committed and agile implementer of change. It is great to hear that you are committed to developing as a leader. That is important. At the same time, change takes time. You want to

move from changing behaviors to creating habits so that these new behaviors become second nature. And then you want to take this further, by creating a mini-process to anchor this change in the organization. Furthermore, your coworkers Admin & Sales 243 want to see the consistency and sustainability of that change. This takes time. From our research, we have found that 12 months of coaching creates >40% more impact than 6 months.

Question 6: How does the quarterly measurement system work?

Each quarter, you and your coworkers will each fill out a survey measuring your improvement in the selected areas of growth. This is called a Pulse Survey, and it will provide you, me, and your manager a clear picture of how others perceive your ongoing growth. Perception is reality.

Question 7: What is your role as the coach in this process?

My role as the coach is like a personal leadership fitness trainer: 4. Facilitator: I will facilitate your leadership development process and help you to pace through your leadership change, in a consistent and systematic way. 5. Sparring / Mirror: Be your sparring and accountability partner. 6. Resource: I will provide you the best resources and expertise to help improve your leadership effectiveness.

Question 8: Can I skip (one or more) coaching sessions if I get busy at work?

In order to achieve the growth you want, we must stick to a regular process. If you cannot make it to a coaching session, we can reschedule it for the following week. No problem.

Question 9: What if I do not like my team members, should I still involve them?

You need to involve your most important coworkers. These are the people with whom you work most often. These are the relationships that need improving. Therefore, yes .

Question 10: Should I agree with all the suggestions people give me?

No. Coworkers will give you suggestions, and then you have the liberty of deciding whether to act on those suggestions. That will be part of our discussions in the coaching sessions.

Question 11: What if I get low scores from a coworker who doesn't like me? Won't this reflect badly on me?

If you involve a coworker who may not like you, one of two things will happen:

1. **The most likely scenario is this:** You ask them for suggestions and they see that some of their suggestions, along with the ones given by other coworkers, are included in the

action plan that you implement. As you progress and put these suggested behaviors into action, it will be very difficult for them to not give you credit for improving, once they do the quarterly Pulse Survey. In most cases, this type of coworker will come around at this point.

2. In the rare case that a coworker does not change their mind, this will be evident in the final review. Your manager can then acknowledge your growth publicly, saying: “You did a great job in improving. The opinions of other coworkers reflect this as well, although there is one person who is unable to recognize this improvement. I am sorry to see that this coworker seems to be holding on to the grievances of the past, unable to move forward. You did a great job, as the average clearly shows how much you have improved. Well done. Thank you.” The Pulse Survey report shows a simple average across all coworkers, whereas the individual responses are anonymous.

Question 12: What if a coworker does not want to participate in the Pulse Survey?

That is fine. They can opt-out if they want.

Question 13: What if a coworker gets transferred to a different team, moves to another part of the organization, or leaves the organization altogether?

If this happens, you should replace them with their successor immediately. I will help you with this, in such a case. If this happens in the last three months of the process, then you will simply continue with fewer coworkers. That is why it is important to start with 6-12 coworkers.

Question 14: What if I only have 3 colleagues who could be considered coworkers?

We can work with 3 coworkers, but more is better. Let us review the colleagues that you work with periodically, to see who we could enroll as coworkers.

Question 15: Can I change my leadership growth area later on as needed?

No. It is important to choose a leadership growth area that is meaty enough to work on for the duration of the coaching engagement. Based on the feedback, leaders generally have a rich list of areas to choose from and most of them are not short-term fixes. For example, if a leader chooses to get better at ‘empowerment,’ there is enough room for improvement and we will not easily run out of ideas.

Question 16: Can I choose just one growth area? Can I choose more than two?

We encourage leaders to choose just one or two growth areas to focus on. In our research, we have found that when a person gets better in one leadership area, they benefit in numerous other areas simultaneously. This is the same in our daily life, when joining a fitness program, a

person will build muscle, lose weight, get more energy, sleep better, have clearer skin, and so on. Likewise, when a leader improves in one area, many other leadership skills improve at the same time. The key to success is to stay focused and not divide your attention. Therefore, no more than two growth areas should be selected.

Question 17: I am not sure this coworker approach works in my environment (culture, industry, organization).

The involvement of coworkers in the coaching process has been used by a million leaders on 6 continents across all industries and types of organizations. People have more similarities than differences. This coaching process works well with leaders who are invested in their leadership development, who stay focused on the areas of growth that their coworkers care about.

Question 18: What if (not all) coworkers provide suggestions every month?

That is fine. Based on the suggestions you do receive, along with your ideas and mine, you will create an action plan and send this to all coworkers.

Question 19: What does the last step “follow up” mean?

As you implement your action plan, it is effective to check in with coworkers to see if they noted the changes you are trying to make, and how this is working for them. Here is an example: “Hi John, I included in my action plan ‘to ask more questions in meetings’. I have been trying to do this over the last two weeks in meetings with you. Did you notice this? How has this been working for you?”