SAGE

TRAINING 2020

PROFESSIONAL SERVICES

www.sage.exchange | hello@sage.exchange | +65 8201 6987

SAGE

We provide training and learning & development solutions for visionary companies.

KEVIN LEGG

MANAGING PARTNER & INSTRUCTOR

PROFILE

Kevin Legg is Managing Partner and Co-Founder of SAGE. Prior to SAGE, Kevin was Managing Director at GLG where he spent 13 years.

Kevin joined GLG in 2004 in New York. Thereafter he moved with the firm to Gurgaon, India, where he built and led the company's team of Europe-focused recruiters. Kevin then moved to Hong Kong as the 3rd employee of the Hong Kong office and the first dedicated client service personnel (Research Manager) in Asia. While in Hong Kong, Kevin transitioned to sales, where he secured many of GLG's first accounts in Asia.

From Hong Kong, he moved to Singapore to found GLG's first office in Southeast Asia, and also hired and managed the teams which built GLG's Sydney and Mumbai offices. In this time, Kevin was responsible for the overall business - including operations, sales, and team management. He built successful teams through his hiring, training, and coaching of GLG's recruitment, sales, and client service personnel in this region.

STEPHEN GONZALEZ

VICE PRESIDENT & INSTRUCTOR

PROFILE

Stephen Gonzalez is Vice President and Co-Founder of SAGE. Prior to SAGE, Stephen was a Senior Account Manager at Oracle and an Account Manager at GLG.

Stephen joined Oracle in 2009 and spent the majority of his 4-year tenure there as the first Account Manager appointed to cover the Bhutan, Cambodia, Laos, Myanmar, and Nepal markets. He grew Oracle's business in these countries to $3M revenue before moving onto GLG, where he was responsible for developing GLG's Private Equity, Sell-Side, and Corporate business for all countries in Southeast Asia ex-Singapore as an Account Manager. In 2 years, Stephen grew his book of business at GLG by 25%.

He then re-joined Oracle, and returned to oversee Bhutan, Cambodia, Laos, and Nepal. His primary responsibility was to launch Oracle's Cloud business in these countries, and he did so successfully, growing Oracle's annual revenue in this territory to over $5M. In recognition of his performance, Stephen was named to Oracle's Club Excellence - the top 1% of Oracle's sales team globally.

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DATA-DRIVEN PROSPECTING

Professional Services

Professional services businesses thrive on the strength of referrals and word-of-mouth. However, as markets mature and become more competitive, passive approaches to business development are no longer enough to rely on. Data-Driven Prospecting for Professional Services will teach business development professionals the tools and techniques they need to proactively find and engage their ideal client prospects in a targeted, process-driven and scalable manner.

This program is designed for anyone who is responsible for business development, whether to find new clients or to generate more business from existing clients.

THE OUTBOUND FUNNEL

In this session, we discuss the importance of taking a process-driven approach to outbound prospecting, the components of an effective prospecting system, and how to get started by defining your ideal customer profile.

You'll learn:

- Each component of *The Outbound Funnel*, a 5-step outbound prospecting system
- How to create your Ideal Customer Profile

BUILDING PROSPECT LISTS AT SCALE - OPTIONAL

In this session, we explore two non-technical web scraping techniques that will help you efficiently build large lists of relevant prospects, how to use freelancers to drastically increase your efficiency, and how you can personalize your lists at scale.

You'll learn:

- How to use the advanced searching functions of LinkedIn to find prospects
- How to use non-technical web scraping to build prospect lists from almost anywhere on the internet
- What information to capture when building a list of prospects
- How to delegate this work to freelancers to increase your efficiency

AUTOMATING YOUR OUTREACH

In this session, we introduce the concept of a sales sequence and discuss the role of sales engagement software in automating your outbound prospecting system.

You'll learn:

- How to create an effective sales sequence
- How to automate and optimize your outbound campaigns using sales engagement software

Coaching Add-On: 1-1 sequence design workshop

CREATING YOUR MESSAGE

In this session, we discuss the difference between 'me' vs. 'you' messaging and how to create a value proposition that aligns with your prospect's priorities and challenges.

You'll learn:

- How to create messaging that focuses on your prospect, not on you
- The principle of exchanging value for action in cold communication

DELIVERING YOUR MESSAGE (EMAIL) - OPTIONAL

In this session, we look at the structure of an effective cold email sequence, share the principles of writing compelling email copy, and bring it all together to help you practice writing and editing your own cold and follow-up emails.

You'll learn:

- The 3-part structure of an effective cold email
- How to write and edit your own cold email
- How to write and edit two types of follow-up emails

Coaching Add-On: 1-1 email editing workshop

DELIVERING YOUR MESSAGE (PHONE) - OPTIONAL

In this session, we examine the flow of an effective 'cold' call and share techniques to get your prospect to talking and agreeing to take action.

You'll learn:

- The structure of an effective cold call
- How to execute your own cold call
- Techniques for overcoming anxiety, creating symmetry, and initiating the conversation

Coaching Add-On: 1-1 live cold calling session

SEGMENTING YOUR ACCOUNTS - OPTIONAL

In this session, we introduce and apply the concept of account segmentation to your existing accounts to help you better target your outreach and prioritize your time.

You'll learn:

- How to segment your accounts into Tier 1, Tier 2, and Tier 3

Coaching Add-On: 1-1 Account Segmentation review

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DELIVERY OPTIONS

ONSITE DELIVERY

- 3-7 two-hour sessions delivered over 2-4 weeks
- Small group exercises and hands-on activities
- Homework assigned after each session

REMOTE DELIVERY

- 3-7 two-hour live-streamed sessions delivered over 2-4 weeks
- Individual exercises and activities to increase engagement
- Homework assigned after each session

REINFORCEMENT PLAN

PRE-TRAINING (MANAGERS)

Three weeks before the training, management and SAGE will meet to review the training materials, answer questions and decide on specific learning outcomes to be emphasized during the training. At this time, managers will also have the option to set their teams up with a specific prospecting campaign that they can execute throughout the duration of the training.

PRE-TRAINING (PARTICIPANTS)

Participants will be provided the training materials one week before the training. They will also be sent a pre-survey to register for the training and assess their level of experience and desired training outcomes.

POST-TRAINING (MANAGERS)

SAGE will conduct a wrap-up meeting with management to provide feedback, analysis and coaching recommendations for each participant and the group as a whole. Managers will receive a post-training resource kit to help them reinforce the training.

POST-TRAINING (PARTICIPANTS)

SAGE will conduct a 1-1 wrap-up meeting with each participant to give overall feedback, recommendations and to answer any questions about the training. Participants will also be given access to a discussion group for direct access to SAGE.

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SELLING WITH INTEGRITY
Professional Services

Selling With Integrity for Professional Services helps professionals improve the quality of their interactions as they engage and guide prospective clients through the buying process. Your team will learn the fundamental techniques of qualifying prospects, handling objections, negotiating, following up and closing business.

This program is is tailored specifically to the Professional Services industry - law firms, consulting firms, financial services firms - and is designed for anyone who is responsible for developing business in new or existing accounts.

QUALIFYING YOUR PROSPECTS

In this session, we look at the evolution of sales qualification frameworks and then focus on the STAND Framework (Spend, Time, Alternatives, Need, Decision-Making) as a guide for asking questions and qualifying your prospects throughout the buyer's journey.

You'll learn:

- To qualify and disqualify prospects using the STAND Framework
- How to effectively deploy different types of questions to better understand the client's situation
- The importance of continuously re-qualifying your prospects

OBJECTION HANDLING

In this session, we explore how to better understand and overcome objections while avoiding the natural tendency toward reaction.

You'll learn:

- How to use active listening to better understand an objection
- A simple, straightforward formula for handling any objection
- How to create a template to help you anticipate and prepare for common objections

Coaching Add-On: 4-1 Objection Handling Game

NEGOTIATING

In this session, we discuss how to negotiate successful agreements by mastering the planning process and understanding how to apply key negotiating levers in a variety of deal-making scenarios.

You'll learn:

- A process to follow when planning for a negotiation
- 3 key negotiation levers and how to apply them
- The difference between transactional and long-term approaches to negotiating

Coaching Add-On: 1-1 Role Play Scenario

FOLLOWING UP & ASKING FOR THE CLOSE

In this session, we talk about the importance of having the right mindset and approach to prospects who delay or ghost you, and the importance of virtually closing throughout the journey.

You'll learn:

- How and why you should always deliver a virtual close
- A mental approach to following up if a client ghosts

Coaching Add-On: 1-1 Role Play Scenario

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DELIVERY OPTIONS

ONSITE DELIVERY

- 4 two-hour sessions delivered over 2-4 weeks
- Small group exercises and hands-on activities
- Challenges provided after each sessions

REMOTE DELIVERY

- 4 two-hour live-streamed sessions delivered over 2-4 weeks
- Individual exercises and activities to increase engagement
- Challenges provided after each sessions

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MASTERING CLIENT MEETINGS

Too many client meetings do more harm to a business's brand than good because the professionals involved either aren't sufficiently prepared, synchronized, or clear on the objectives that will define the meeting's success. In *Mastering Client Meetings*, we thoroughly examine the preparation, execution and review of a client meeting. You'll leave this program with a system for conducting client meetings and a number of techniques that will help you and your team improve your meeting performance over time.

This program is designed for anyone who is responsible for leading, or participating in, client meetings of any kind.

PRE-MEETING PREPARATION

In this session, we explore what to prepare before every meeting, how to efficiently research individuals and companies, and how to structure your preparation in order to put yourself in a position to achieve the best outcome possible.

You'll learn:

- How to set SMART meeting objectives
- How to efficiently research companies and individuals
- How to prepare yourself and your team for meetings

OPENING & CLOSING THE MEETING

In this session, we break down the four components of effective openings and effective closings, and discuss how to avoid the common mistakes that professionals make in these two critical phases of the meeting.

You'll learn:

- How to create a meeting environment that allows your client to feel comfortable sharing their priorities and challenges with you
- How to uncover a hidden agenda and avoid getting blind-sided before the meeting begins
- How to use permission to avoid or discuss sensitive topics
- How to set expectations and eliminate time-wasting at the end of client meetings

TAKING MEETING NOTES

In this session, we introduce *SAGE Notes*, a system designed for taking notes during client meetings, to improve your overall note-taking speed and accuracy, and share best practices for processing your notes to ensure they remain referenceable long after the meeting finishes.

You'll learn:

- The *SAGE Notes* system for taking notes during client meetings
- 3 techniques to help improve your note-taking speed and accuracy
- Best practices for processing your notes and following up after the meeting ends

REVIEWING THE MEETING

In this session, we talk about why reviewing every client meeting is so important for your professional development. Then we introduce the *10-Minute Meeting Review*, a 5-step system for reviewing every client meeting, to help you standardize the way you and your team analyze your meeting performance.

You'll learn:

- The *10-Minute Meeting Review* system for reviewing and analyzing client meetings
- How to self-assess your own meeting performance

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