

BIG

Bunnell Idea Group

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GrowBIG®

Grow Your Book of Business,
Relationships, and Career

**Digital Training Materials
Modules 1-17**

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→ GrowBIG® Integrated System

GrowBIG® Training is a comprehensive business development methodology, providing every skill needed to be successful. It's designed for technical professionals that have to retain and grow client relationships, even when they're busy. Over 150 peer-reviewed studies provide the science behind the proven steps taught in the training.

<p>Authentically Build Your Personalized Foundation</p> <p>Adopt The Right Mindset By Focusing On A Better Buying Process Create a client-centric, enjoyable, fast path to a yes 1</p> <p>Adapt Your Thinking To Win With Everyone Adapt to unique thinking styles to connect with anyone you work with 2</p>	<p>Efficiently Win Business In A Way Your Clients Will Love</p> <p>Listen And Learn For A Triple Win Ask well-designed questions that are a pleasure to answer, deepen relationships and give us a unique growth advantage 3</p> <p>Create Curiosity To Increase Engagement Leverage the intrinsic power of curiosity to attract attention and build momentum 4</p>	<p>Authentically Create Demand For Work You Want Most</p> <p>Create Demand Through A Relationship Advantage Use the science of likeability and top-of-mindedness to create a relationship advantage 8</p> <p>Create Demand Through Your Expertise Leverage the science of strategically giving to generate traction for the work you want 9</p>	<p>Create Momentum Throughout The BD Process</p> <p>Plan And Execute Your BD Meetings To Make Positive Progress Efficiently plan and execute successful business development meetings, from informal introductions to high stakes finalist presentations 10</p> <p>Craft And Execute Client Growth Plans To Grow Your Impact Get your client team strategically aligned and operationally streamlined to grow 11</p>	<p>Elevate Your Impact To Take Control</p> <p>Assess Your Progress To Move Forward Reflect on your growth and take your skills to the next level 13</p> <p>Develop Targeting Criteria To Focus Your Efforts Identify the specific, fact-based criteria to drive outsized results through prioritizing your BD efforts 14</p>
<p>Build Everything Together To Get The Yes Use the science of small advances to get big results 5</p> <p>Position Your Offerings Uniquely To Be Chosen More Often Use the science of positioning to win more 6</p>	<p>Talk About Money With Confidence Use mental heuristics and behavioral economics to get paid what you're worth 7</p>		<p>Build Powerful BD Habits Hack your habits to grow your book of business and deepen relationships, even when you're really busy 12</p>	<p>Foster New Relationships: Broaden Out And Ladder Up Meet the right new people in ways they'll want to bend their schedule to meet you, instead you bending yours to meet them 15</p> <p>Gain Traction With Early Stage Relationships Design your short-term interactions to create long-term success 16</p>
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Adopt The Right Mindset By Focusing On Designing A Better Buying Process

How To Create A Client-Centric, Enjoyable, And Fast Path To A Yes.

↓ MODULE OVERVIEW

This module introduces you to key qualities possessed by Rainmakers and ideals embraced by the world's most successful business development professionals.

- Business Development is a Learnable Skill.
- Your goals as a rainmaker are to be proactive, strategically helpful and focused on the next step.
- Rainmakers always follow a process.

↓ OBJECTIVES

At the end of this module, you will be able to:

- ✓ List the qualities possessed by modern Rainmakers
- ✓ Design and follow a process to create a desirable buying process
- ✓ Develop a preliminary action plan for moving your current opportunities to the next step in the Opportunity Process





What's your biggest personal insight about Ericsson's and Grant's research?
How does this impact you personally?

A large, empty rectangular box with rounded corners, intended for the user to write their response to the question above.

ACTIVITY → Conduct A Self-Assessment

The best place start is with a self-assessment. Think about this self-assessment like scores for artistic events in the Olympics similar to platform diving or gymnastics floor routines. They're not perfect, but they give a numerical score for an abstract skill. The specific breakdown in this activity will give you insights for where you are now and what you should focus on next. Fill out the following profile using these definitions (double the scale for Efficiency):

- 1 – I could use a few pointers here.
- 2 – I'm doing OK on this.
- 3 – Ah! One of my strengths.
- 4 – I am exceptionally good at this.
- 5 – I am an expert. I have nothing left to learn about this.

Measurement		Vision	
Question	Score	Question	Score
How much money did I bring in during the last year compared with how much I would have liked to? [Score 1 to 5]		Have I defined the areas where my ideal clients will be spending money in the future? [Score 1 to 5]	
How much time did I dedicate to BD in the last year compared with how much I would have liked to? [Score 1 to 5]		Do I have a clear brand I promote in the marketplace that is aligned with these areas? [Score 1 to 5]	
Do I have an ongoing process for measuring and reinforcing my personal success? [Score 1 to 5]		Do I have a clear BD strategy for each step in the process, from generating leads to closing deals, and do I follow it consistently? [Score 1 to 5]	
Do I have an ongoing process for measuring and reinforcing my team's success or, if solo, my success with my outside collaborators and strategic partners? [Score 1 to 5]		Do I have a vision for integrating current clients, strategic partners, and colleagues with my overall business strategy? [Score 1 to 5]	
Total Measurement Score (Max = 20)		Total Vision Score (Max = 20)	
Efficiency		Relationship	
Question	Score	Question	Score
Do I have an ongoing series of meetings to measure and track my success? These "meetings" can be just with yourself, with an accountability partner, or with your team. The key is that you allot time to managing your pipeline just as you do for managing any important project. [Score 1 to 10]		Have I identified—and written down—the key characteristics of my ideal clients? [Score 1 to 5]	
Do I have an easy-to-use system to measure and track my success? [Score 1 to 10]		Have I used these key characteristics of my ideal clients to identify and write down the organizations I'd like to get introduced to? [Score 1 to 5]	
Do I hold myself accountable for my commitments? [Score 1 to 10]		Do I have a method for investing in and being helpful to the most important people who will help me grow (clients, strategic partners, influencers)? [Score 1 to 5]	
Do I celebrate my incremental successes (not just the end goal of closing business deals but also the progress toward that end) personally and with my colleagues? [Score 1 to 10]		Do I have an appropriate number of touch points to stay top of mind with these most important people, and do I track my touch points? [Score 1 to 5]	
Total Efficiency Score (Max = 40)		Total Relationship Score (Max = 20)	
Total Score (Measurement + Vision + Efficiency + Relationship)			

What were your top learnings from this exercise?

ACTIVITY → Decoding Buying Experiences

Your facilitator will guide you through an exercise in which you'll recall and describe both a negative and positive buying experience you've had.

Negative	Positive



What's your personal insight about the how buying experiences should feel?

ACTIVITY → Define Your Why

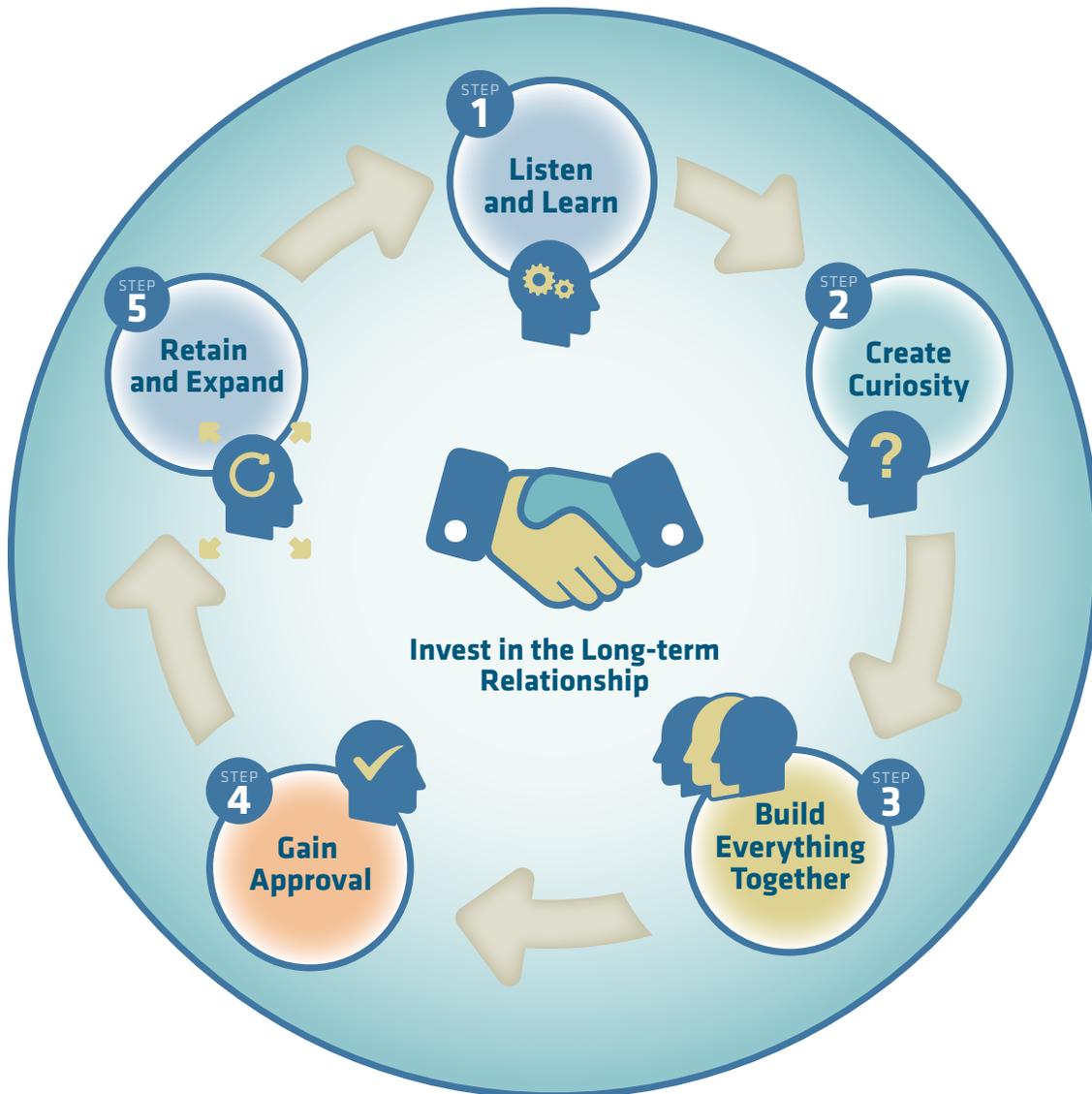
Recognizing the positive outcomes of functioning as a great business developer, what is going to motivate you to do what that takes? What is your ultimate Why for becoming a great business developer? Use the 5 Whys technique to list out the 5 Whys that result in your ultimate motivation for becoming a great business developer. Start with an initial response to, “Why do you want to be a great Business developer?” Then, ask yourself, “Why?” in response to each previous answer. An example of this process might look like this:

	I want to be a great business developer because . . .
Why? 1	I want to perform my role with excellence.
Why? 2	Why do I want to perform my role with excellence? I want others to know I’m great at BD.
Why? 3	Why do I want others to know I’m great at BD? I would love to run my organization one day and being a rainmaker is one of the most important criteria.
Why? 4	Why do I want to run my organization? I want to run my organization because I’ve fallen in love with this place and see potential to grow and help others like I was helped.
Why? 5	Why do I want to grow and help others like I was helped? This place showed me I can do so much more than I thought I could. I want to create that experience for 100s of others, giving them even more than what I’ve received.

Now, complete the chart for yourself.

	I want to be a great business developer because . . .
Why? 1	
Why? 2	
Why? 3	
Why? 4	
Why? 5	

→ The Opportunity Process: Your Path To Growth



Opportunity Process	STEP 1 Listen and Learn	STEP 2 Create Curiosity	STEP 3 Build Everything Together	STEP 4 Gain Approval	STEP 5 Retain and Expand
How it should feel to the buyer	<ul style="list-style-type: none"> I feel understood 	<ul style="list-style-type: none"> I'm excited and curious about the next step 	<ul style="list-style-type: none"> This is an amazing proposal! 	<ul style="list-style-type: none"> I can't wait to begin 	<ul style="list-style-type: none"> I want to do more business with this organization
Significant science	<ul style="list-style-type: none"> People love talking about themselves Well- designed questions correlate to liking You'll learn their priorities in their words 	<ul style="list-style-type: none"> Curiosity is an intrinsic motivator We remember more when we are curious We attend events we are curious about 	<ul style="list-style-type: none"> We buy into what we help create We commit to our own ideas 	<ul style="list-style-type: none"> It's important to get micro-commitments along the way Many small yes's create alignment and remove risk 	
Key researchers	<ul style="list-style-type: none"> Dr. Diana Tamir 	<ul style="list-style-type: none"> Dr. Mathias Gruber 	<ul style="list-style-type: none"> Drs. Michael Norton and Dan Ariely 		
Move to the next step when...	<ul style="list-style-type: none"> They agree you've correctly paraphrased their situation 	<ul style="list-style-type: none"> They are truly interested in hearing about working together 	<ul style="list-style-type: none"> They agree the proposal is a perfect fit 	<ul style="list-style-type: none"> They are excited about the work you're about to do or are doing 	<ul style="list-style-type: none"> They have other needs you can help with
Big takeaway	<ul style="list-style-type: none"> Ask "personal perspective" questions Listen carefully 	<ul style="list-style-type: none"> Talk just enough to create curiosity 	<ul style="list-style-type: none"> Engage the client early and often Make it simple to let the client add value as you design your solutions 	<ul style="list-style-type: none"> Ask for micro approvals throughout the process 	

What was your biggest insight when filling out your Opportunity List?

What practical action can you take to improve the proactiveness and strategic helpfulness of your actions?

What can you do to create a more efficient process for yourself, always focused on the next right step?

A blue arrow pointing to the right, positioned to the left of the word 'Resources'.

Resources

Ericsson, Anders, and Robert Pool. *Peak: Secrets from the New Science of Expertise*. Eamon Dolan, 2017.

Grant, Adam M. "Rethinking the Extraverted Sales Ideal." *Psychological Science*, vol. 24, no. 6, 2013, pp. 1024–1030., <https://doi.org/10.1177/0956797612463706>

Tamir, D. I., and J. P. Mitchell. "Disclosing Information about the Self Is Intrinsically Rewarding." *Proceedings of the National Academy of Sciences*, vol. 109, no. 21, 2012, pp. 8038–8043., <https://doi.org/10.1073/pnas.1202129109>

Gruber, Matthias J., et al. "States of Curiosity Modulate Hippocampus-Dependent Learning via the Dopaminergic Circuit." *Neuron*, vol. 84, no. 2, 2014, pp. 486–496., <https://doi.org/10.1016/j.neuron.2014.08.060>

Norton, Michael I., et al. "The IKEA Effect: When Labor Leads to Love." *Journal of Consumer Psychology*, vol. 22, no. 3, 2012, pp. 453–460., <https://doi.org/10.1016/j.jcps.2011.08.002>

→ Module 1 **BIG** Finish

Business development will likely determine your career trajectory. You'll want to manage it like an ongoing project. The first step is documenting things so you can see them. You can't manage an important, ongoing process in your head.

In Summary....

- Business Development is a learnable skill.
- Rainmakers always follow a process that's focused on being proactive and strategically helpful.
- Rainmakers aren't focused on "closing." They're focused on creating a great buying experience and getting to the next step.

FINAL ACTIVITY

List one action you will take right away to improve your Rainmaker skills.

Adapt Your Thinking To Win With Everyone

How To Adapt To Unique Thinking Styles To Connect With Anyone You Work With

↓ MODULE OVERVIEW

This module introduces you to a way of thinking that will help you be more authentic and balanced in your client interactions. Whole Brain® Four-Quadrant Thinking uses a four quadrant metaphor for the brain and is based on the Herrmann Brain Dominance Instrument®, a 120-question assessment you completed before this course.

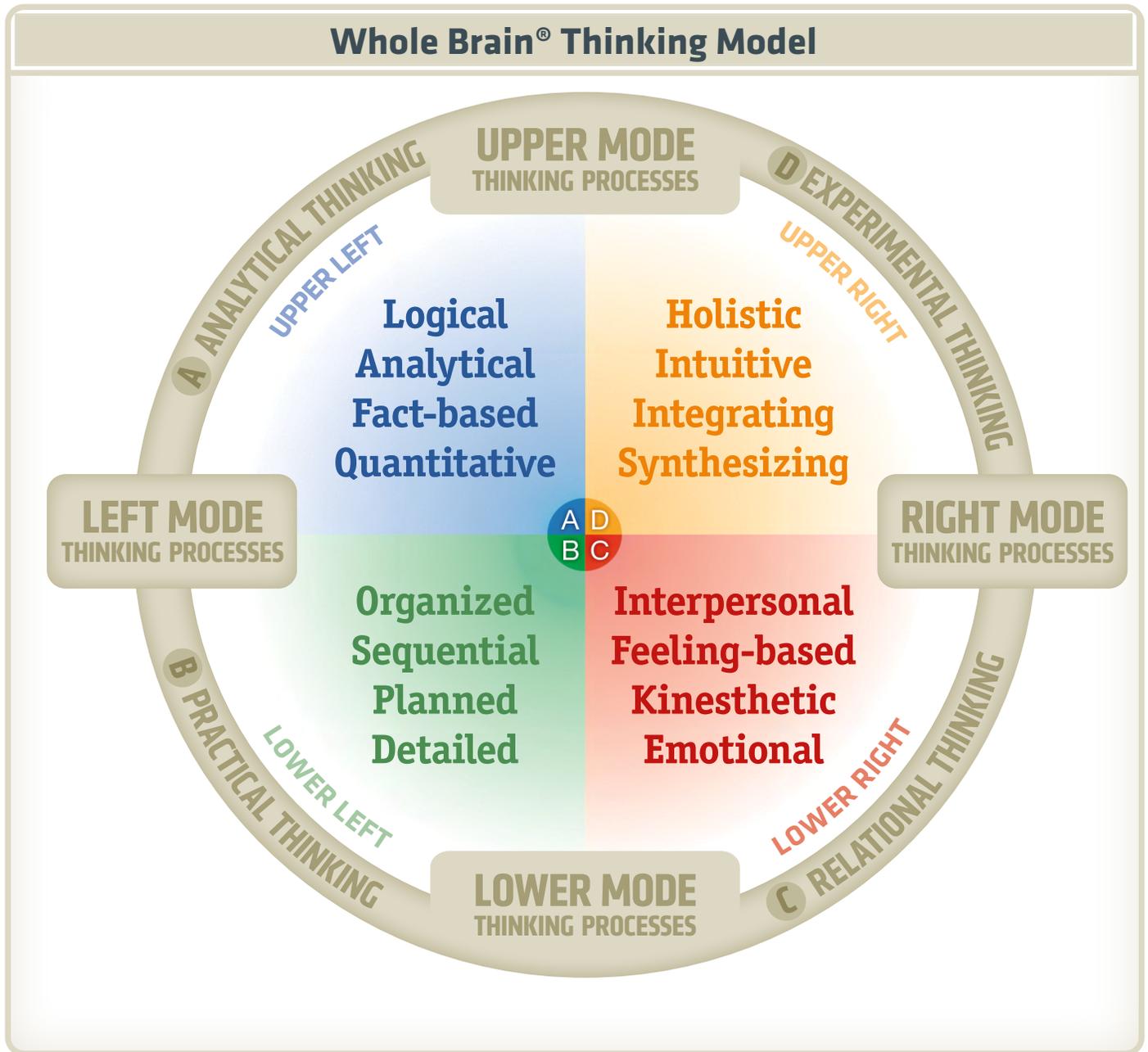
↓ OBJECTIVES

At the end of this module, you will be able to:

- ✓ Describe Whole Brain® Four-Quadrant Thinking and why it is important for client interactions
- ✓ Identify your preferred thinking style and the thinking style of others
- ✓ Describe the interactions between same and different quadrant thinking
- ✓ Identify one behavior that you will change because of differences or similarities in the thinking styles between you and your client
- ✓ Demonstrate the use of a Whole Brain® Walk-Around to prepare for a client interaction or solve a problem

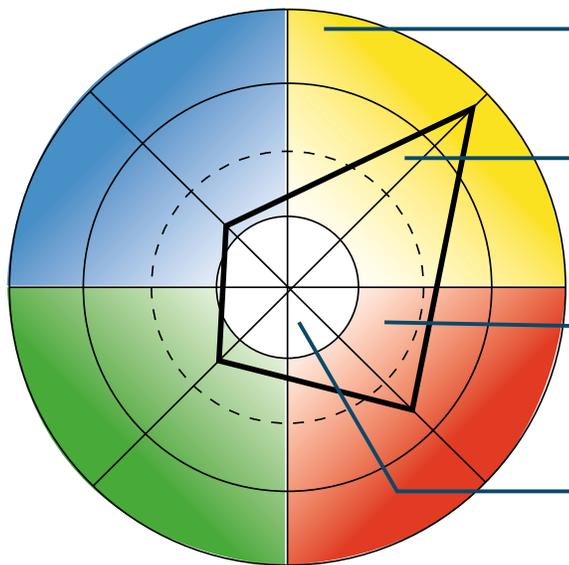


→ Whole Brain® Four-Quadrant Thinking



→ Your HBDI® results

Example HBDI Profile



Visibly Strong Preference

Typically the thinking style is so strongly preferred that most everyone around knows

Strong Preference

Thinking or working in the preferred quadrant(s) is very satisfying and seems natural

Medium Preference

Generally comfortable using this thinking style when needed

Low Preference

May avoid thinking this way



What's your biggest personal insights from the research of Dr. Paul McLean and Dr. Roger Sperry, and from Ned Herrmann's Herrmann Brain Dominance Instrument (HBDI)?

A large, empty rectangular box with rounded corners, intended for the user to write their personal insights.



What is your biggest insights from your HBDI profile?

A large, empty rectangular box with rounded corners, intended for the user to write their biggest insights from their HBDI profile.

ACTIVITY → Learn How To Adapt To The Thinking Styles Of Others

Use this worksheet to record general information about other people’s thinking styles based on your observations.

	Clues	Priority for Making Decisions	How to Adapt
THINKING STYLE: ANALYTICAL			
THINKING STYLE: PRACTICAL			

ACTIVITY → Learn How To Adapt To The Thinking Styles Of Others

	Clues	Priority for Making Decisions	How to Adapt
THINKING STYLE: EXPERIMENTAL			
THINKING STYLE: RELATIONAL			



What's your biggest personal insights about the communication benefits of teaching in a Whole Brained way from the research of Ali Khalid and Ali Bawaneh's research?

A large, empty rectangular area with rounded corners, intended for the user to write their response to the question above.

ACTIVITY → Create A Whole Brain® Walk-Around

Create a simple Whole Brain® Walk-Around for preparing for client interaction. You will be able to use this as a checklist each time you have a client interaction, whether it's a phone call, an email, a brief presentation, or a suggestion to move the business development process to the next step.

What: Work in assigned teams to create a checklist for ensuring that you communicate with your clients in a Four-Quadrant way.

How: You will have 15 minutes to create your checklist. The Whole Brain® Walk-Around should be represented in the Four Quadrants.

Who: The facilitator will form you into groups.

Add your ideas in the correct quadrants below.

Analytical	Experimental
Practical	Relational

→ Preparing for Presentations That Resonate

Analytical Thinking	Practical Thinking	Relational Thinking	Experimental Thinking
logic	organized	interpersonal	vision
research	sequential	feelings	future
analysis	step-by-step	emotions	strategy
facts	linear	culture	innovation
quantitative	planned	teamwork	conceptual
critical	detailed	partnering	global
precision	safety	sharing	holistic
realistic	process	supportive	creative
financial	procedure	expressive	artistic
metrics	agenda	teaching	spatial
measures	schedule	sensitive	integrating
technical	timeline	understanding	synthesizing
comparisons	implementation	empathy	fun
data	risk reduction	talking	playful
accuracy	focus	friendship	surprise
problem solving	priorities	listening	risk-taking
bottom line	best practices	values	impulsive
efficiency	responsibilities	helping	imaginative
trends	accountability	communicating	brainstorming
performance	measurement	mentoring	independent
goals	evaluation	coaching	esthetic
objectives	controls	trust	big picture

→ Resources

Bawaneh, A., Zain, A. N. M., & Salmiza, S. "The Effect of Herrmann Whole Brain Teaching Method on Students' Understanding of Simple Electric Circuits." *European Journal of Physics Education*, vol. 2, no. 2, 2011, pp.1-23

Herrmann, Ned, and Ann Herrmann-Nehdi. *The Whole Brain Business Book: Unlocking the Power of Whole Brain Thinking in Organizations, Teams, and Individuals*. 2nd ed., McGraw-Hill Education, 2015.

→ Module 2 **BIG** Finish

In Summary...

- Everyone has a natural preference in the way they think: logical, ordered, feeling-based, or conceptual.
- Your HBDI® profile represents your degree of preference in one or more quadrants of the brain.
- Thinking preferences act like filters for everything you hear, say, and think. Increased awareness of your thinking preferences will help you become more aware of your least preferred thinking styles.
- Understanding yourself, picking up clues from others, and adapting your style to their preferences will enhance your communication skills.
- If you can't determine another person's thinking style, use a Whole Brain® Walk-Around to ensure you have addressed each quadrant.
- A Whole Brain® Walk-Around is a powerful tool for problem solving, decision making, and communicating in all four thinking styles.

→ **FINAL ACTIVITY**

Write down your least preferred thinking style along with at least one behavior you will change to adapt to people with a strong preference for that thinking style.

Listen And Learn For A Triple Win

Ask Well-Designed Questions That Are A Pleasure To Answer, Deepen Relationships And Give Us A Unique Growth Advantage

↓ MODULE OVERVIEW

This module will help you learn to ask great questions to achieve the triple win: Have people enjoy answering your questions, like you more, and teach you things you can't learn anywhere else. You will learn a questioning model that will allow you to talk about anything, anywhere, with anyone!

↓ OBJECTIVES

At the end of this module, you will be able to:

- ✓ Explain how to achieve the triple win
- ✓ Explain the Gravitas Model and how you can use it to have broader, deeper conversations, even outside your area of expertise
- ✓ Demonstrate the use of the Gravitas Model in areas where you are or aren't an expert



➔ How This Module Fits In





What's your biggest personal insights about overestimating our skill level when it comes to often-used skills from the research of Dr. Justin Kruger Dr. David Dunning?



What's your biggest personal insights on Earned Dogmatism from the research of Dr. Victor Ottati?

→ The Triple Win of Asking Questions



Asking great questions gives the answerer an enjoyable experience



Asking great questions will make you more likeable



Asking great questions will help you become unique in the mind of the buyer



What's your biggest personal insights about the impact on our thinking when we get to share about our personal experiences and perspectives from the research of Dr. Diana Tamir?



What's your biggest personal insights about the correlation of liking and asking questions from the research of Dr. Karen Huang?



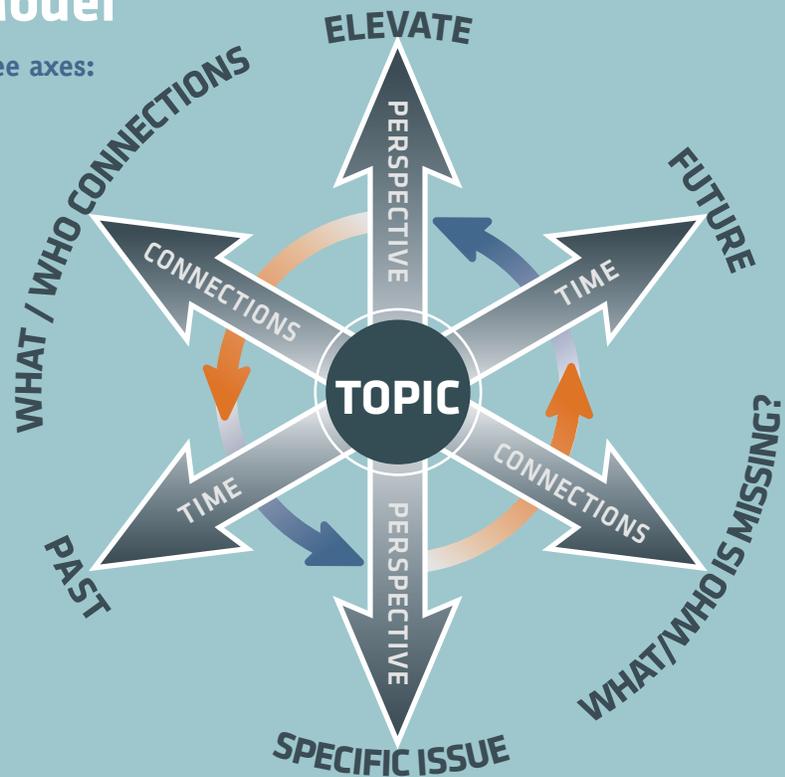
What's your biggest personal insights about the connection between pleasure and memory from the research of Dr. Robert Yerkes?

→ The Gravitas Model: How To Ask Great Questions

The Gravitas Model

The Gravitas Model has three axes:

- 1 Time Dimension
- 2 Perspective Dimension
- 3 Connections Dimension



ACTIVITY → Use The Gravitas Model

In pairs, practice Gravitas. The goal of this activity is to find out as much as you can about your partner's area of expertise using the Gravitas Model. The facilitator will provide additional instructions. Write down some of your favorite Gravitas questions on the Gravitas Model Worksheet.

The Gravitas Model has three axes:

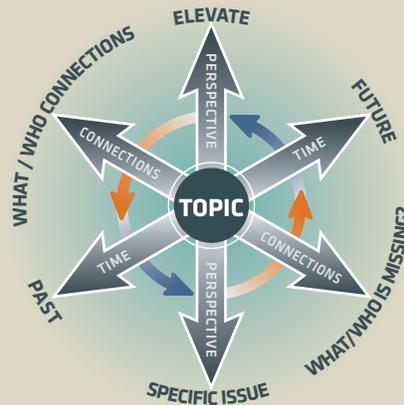
- 1 Time Dimension
- 2 Perspective Dimension
- 3 Connections Dimension

WHAT / WHO CONNECTIONS	
1	
2	
3	
4	
5	
6	

ELEVATE	
1	
2	
3	
4	
5	
6	

FUTURE	
1	
2	
3	
4	
5	
6	

PAST	
1	
2	
3	
4	
5	
6	



WHAT / WHO IS MISSING?	
1	
2	
3	
4	
5	
6	

SPECIFIC ISSUE	
1	
2	
3	
4	
5	
6	

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Resources

Kruger, Justin, and David Dunning. "Unskilled and Unaware of It: How Difficulties in Recognizing One's Own Incompetence Lead to Inflated Self-Assessments." *Journal of Personality and Social Psychology*, vol. 77, no. 6, 1999, pp. 1121–1134., <https://doi.org/10.1037/0022-3514.77.6.1121>

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Huang, Karen, et al. "It Doesn't Hurt to Ask: Question-Asking Increases Liking." *Journal of Personality and Social Psychology*, vol. 113, no. 3, 2017, pp. 430–452., <https://doi.org/10.1037/pspi0000097>

→ Module 3 **BIG** Finish

In Summary....

- Asking great questions can result in a triple win. It gives the answerer an enjoyable experience, it helps them like us more, and it will help us be more unique in the eyes of the buyer.
- By using the Gravitas Model, you can feel comfortable talking about anything, even things outside our area of expertise.
- The Gravitas Model has 6 dimensions: Past, Future, Elevate, Specific Issue, What/Who Connections, What/Who Is Missing?
- You can become great at cross servicing your clients by leveraging Gravitas questioning and GTG with other company experts.



→ FINAL ACTIVITY

How will using the Gravitas Model help you?

Create Curiosity To Increase Engagement

Leverage The Intrinsic Power Of Curiosity To Attract Attention And Build Momentum

↓ MODULE OVERVIEW

Most professionals can fall into the trap of covering too much too soon. They might feel pressure to communicate every last piece of information needed for a yes for the entire buying process, all in one meeting. It's far better to focus on creating curiosity—curiosity motivating the decision makers to want to take the next step with you, both within meetings and between them. This module will show you a way to create curiosity, engagement and momentum throughout the entire buying process. The best part about is that your clients will love it!

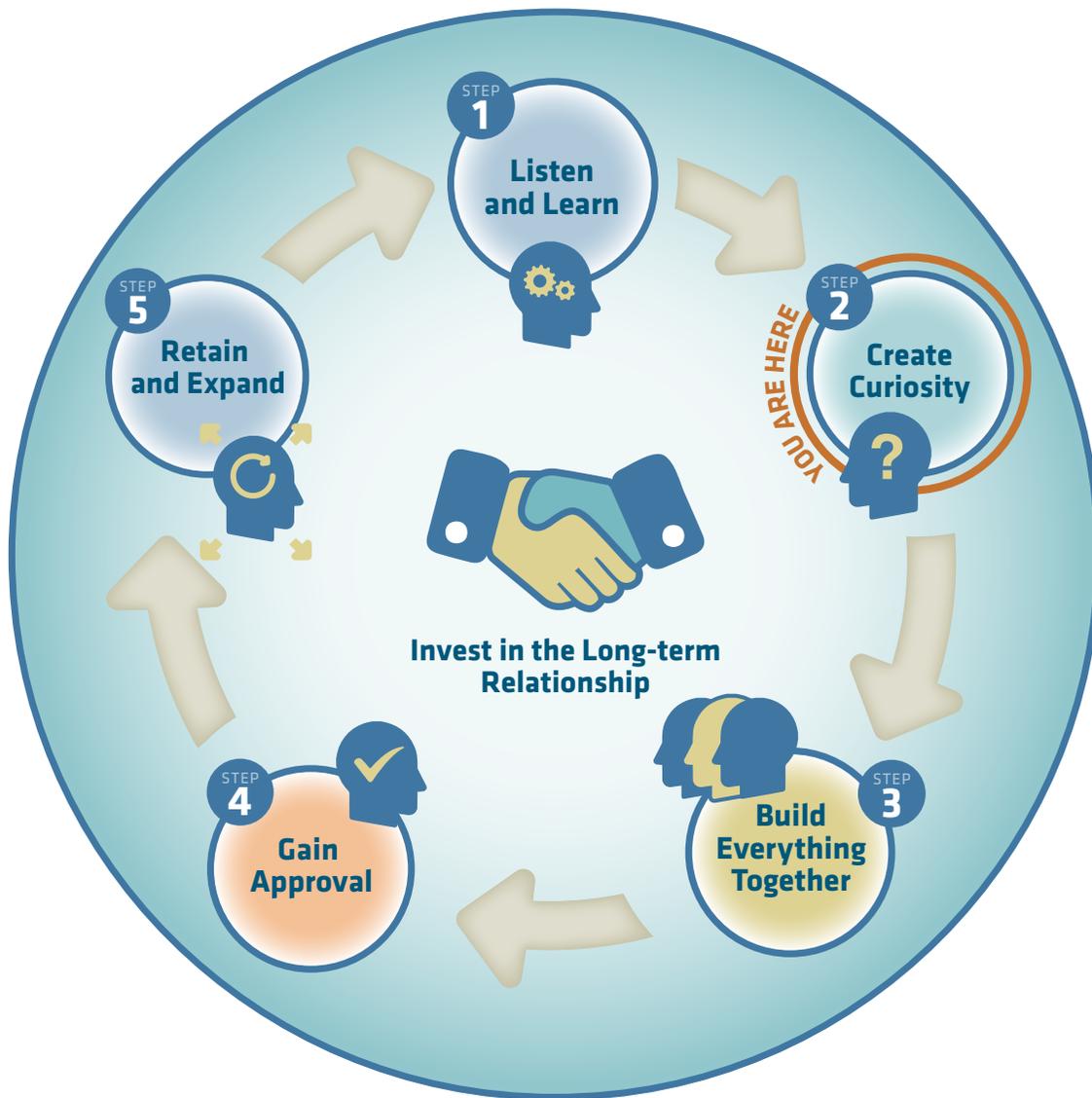
↓ OBJECTIVES

At the end of this module, you will be able to:

- ✓ Recite how curiosity motivates people
- ✓ Break down a longer buying cycle into discrete interactions
- ✓ Create curiosity within and between meetings
- ✓ Introduce yourself in a way that creates curiosity



➔ How This Module Fits In





What's your biggest personal insights about the benefits of using curiosity from the research of Dr. P.Y. Oudeyer, Dr. Jacqueline Gottlieb, Dr. Vincent Costa, and Dr Matthais Gruber?



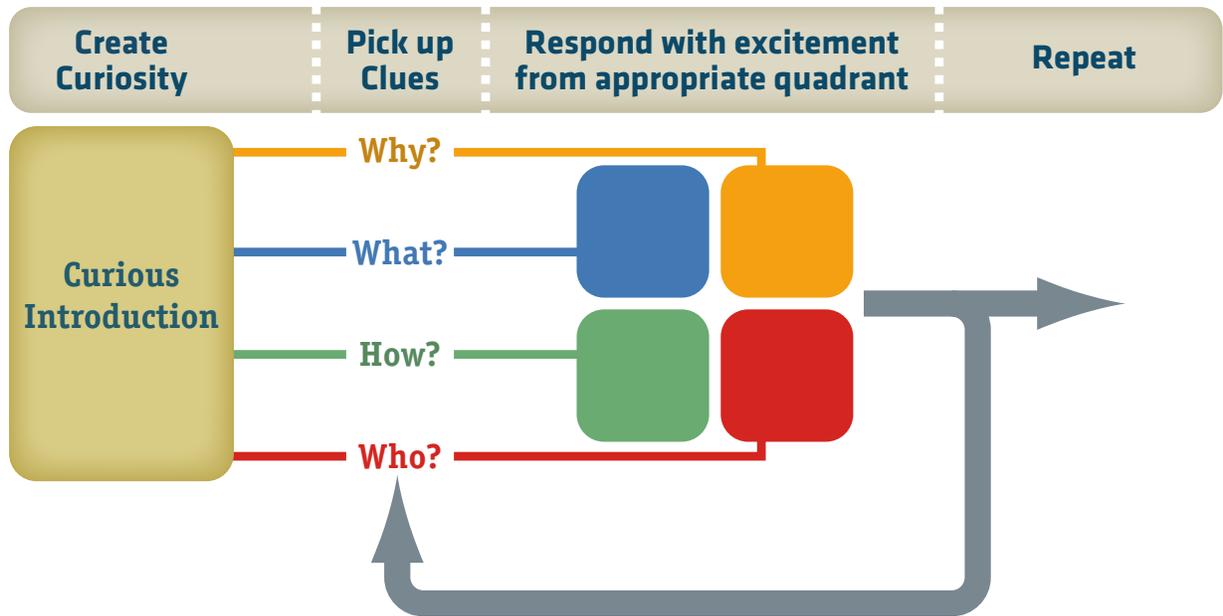
What's your biggest personal insights about when and how to use curiosity from the research of Dr. Uma Karmaaker, Luke Burgis, Dr. Kathleen Wernke, and Dr. Andrew Meltzoff?

ACTIVITY → Brainstorm Ways You Can Create Cliffhangers In Between Meetings

Use the chart below to brainstorm as many types of cliffhangers as possible. You can use these later to dial up curiosity and your clients or prospects curious between meetings.

Analytical	Experimental
Practical	Relational

→ A Curiosity Creating Framework For Introducing Yourself



 **ACTIVITY → Create And Practice Your Curious Introduction**

Part 1: Create Your Curious Introduction

Write out your complete curious introduction. Make sure you include potential responses that touch on all 4 quadrants.

Part 2: Practice Your Curious Introduction

The facilitator will provide instructions for practicing your Curious Introduction with someone

Part 3: Solicit and Provide Feedback

Share feedback with your partner: what's one thing they should change, what's one thing they should keep?

Create Curiosity

Curious Introduction

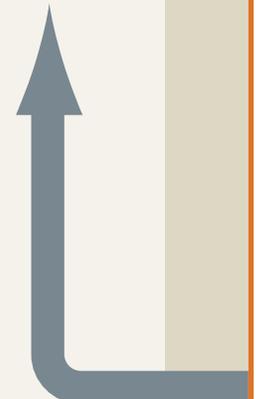
Pick up Clues

Why?

What?

How?

Who?



Respond With The Right Level Of Enthusiasm From Appropriate Quadrant

Repeat

What?

Why?

How?

Who?



A blue arrow pointing to the right, positioned to the left of the word "Resources".

Resources

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- Meltzoff, Andrew N., and M. Keith Moore. "Imitation of Facial and Manual Gestures by Human Neonates." *Science*, vol. 198, no. 4312, Oct. 1977, pp. 75–78., <https://doi.org/10.1126/science.198.4312.75>
- Burgis, Luke. *Wanting: The Power of Mimetic Desire in Everyday Life*. St. Martin's Press, 2021.
- Cialdini, Robert M. *Influence: Science and Practice*. HarperCollinsCollegePublishers, 1993.
- Lynn, Michael. "Scarcity Effects on Desirability: Mediated by Assumed Expensiveness?" *Journal of Economic Psychology*, vol. 10, no. 2, June 1989, pp. 257–274., [https://doi.org/10.1016/0167-4870\(89\)90023-8](https://doi.org/10.1016/0167-4870(89)90023-8)

→ Module 4 **BIG**Finish

In Summary...

- Curiosity is one of the most powerful motivators in the human mind.
- When people are curious, they invest their time, they are more engaged, and they remember more.
- Four ways to dial up curiosity are to: unfold stories over time, introduce cliffhangers, share when you're curious yourself, and share models of who your clients can become.
- Leverage curiosity during and between meetings.
- You can spark curiosity in the way you introduce yourself.

→ **FINAL ACTIVITY**

How will adding curiosity into and between your meetings improve your results?

Build Everything Together To Get To The Yes

Use The Science Of Small Advances To Get Big Results

↓ MODULE OVERVIEW

Ask any professional to name the most frustrating part of their job and they'll probably say, "It takes frustratingly long to get deals done." This is true in nearly every industry for nearly every service and product. This module will give you skills to help you build and maintain momentum to keep things moving forward.

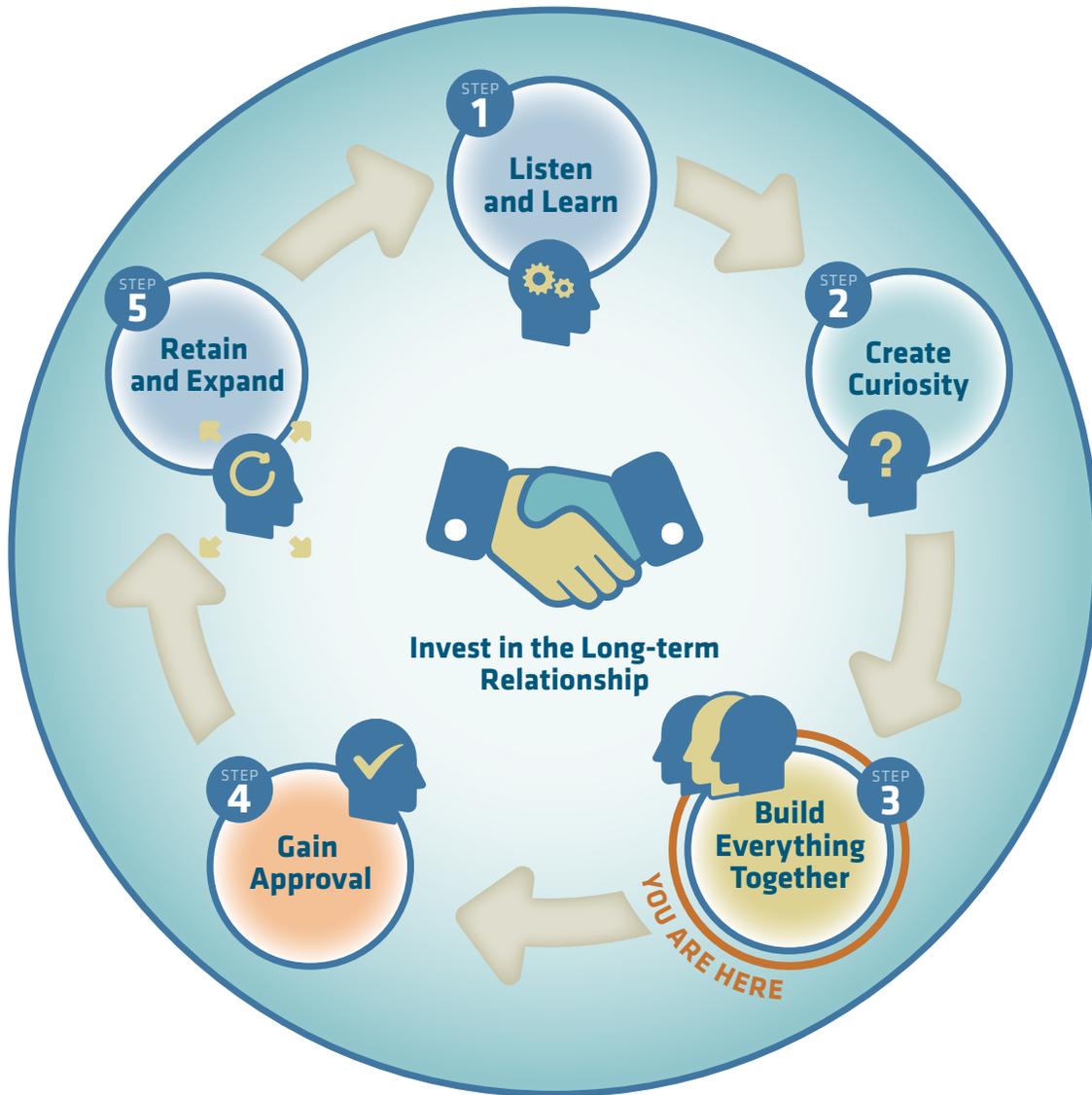
↓ OBJECTIVES

At the end of this module, you will be able to:

- ✓ Describe the four skills required for keeping the business development process moving forward
- ✓ Use a model to build everything together with your client that enhances your chances of being chosen
- ✓ Utilize a framework for storytelling to ensure that you have more memorable conversations with your clients and prospects
- ✓ Describe the ways you can ask for the advance at various stages of the business development process to keep things quickly moving
- ✓ Develop a list of responses for quickly resolving objections



➔ How This Module Fits In





What's your biggest personal insights about how we buy into what we help create from the research of Dr. Michael Norton and Dr. Dan Ariely?



What's your biggest personal insights about becoming passionate about what we help create from the research of Dr. Michael Gielnick and Dr. Matthias Spitzmuller?

ACTIVITY → Building Everything Together

Think about all the different aspects of business development that are unique to you. Document all the potential little decisions you and your clients need to make to gain buy-in. Your facilitator will instruct you on how to work in small groups to make a list of the typical Building Everything Together concepts you encounter. Breaking the “big agreement” down into small incremental agreements will help you increase engagement and Gain Approval faster.

<p>4. Agree on pricing, terms, and conditions</p>	<p>1. Agree on the goals</p>
<p>2. Agree on process and timing</p>	<p>3. Agree on roles and responsibilities</p>



What's your biggest personal insights of the research about storytelling from Dr. Gordon Bower, Dr. Michael Clark, and Dr. Veronique Boulenger?

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ACTIVITY → Identify The Stories You Need To Have

In the space below, think about all the stories you need to practice so that you will have more meaningful and memorable conversations with your prospects and clients. Pick the one story you want to practice during this class.

ACTIVITY → Write One Story In Detail

Using the story you have selected to build out and practice, use the space below to frame out the core story elements for each of the three acts. Once you have completed your story outline, you will be paired with a partner, and you will take turns sharing your stories with each other. Each listener will provide feedback and identify one thing to change and one thing to keep.

	The Call	The Conflict	The Conclusion
Key Story Element	What action must be taken?	What did it take to win?	What impact did this have?
Key Connective Details			
This Act Ends When...			



What's your biggest personal insights about commitment and consistency from the research of Dr. Jonathan Freedman?



What's your biggest personal insights about asking for the advance from the research of Dr. M. Mahdi Roghanizad, Dr. Vanessa K. Bohns, Dr. David Nickerson, Dr. Todd Rogers, Dr. Fancis Flynn, and Dr. Vanessa Lake (now Bohns)?

ACTIVITY → Ask For The Advance

Use the table below to document ways you can ask for the advance in each step of the Opportunity Process. Try to come up with a way that would appeal to each thinking style, filling up as much of the grid in the time your facilitator gives you.

	Analytical	Practical	Relational	Experimental
LISTEN AND LEARN				
CREATE CURIOSITY				
BUILD EVERYTHING TOGETHER				
GAIN APPROVAL				
RETAIN AND EXPAND				



What's your biggest personal insights from the three ways of overcoming objections?

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ACTIVITY → Handle Your Common Objections

Think through some common objections you encounter and write them down in the left column. Choose the the objection you'd like to work on the most and fill out that row all the way across. Complete as many rows as you can in the time your facilitator gives you.

Initial Objection Presented By Client	Initial Question You Can Ask To Better Understand Their Underlying Issue	Real Underlying Issue The Client Might Have	Your Resolution That Will Overcome The Client's Real Issue

A blue arrow pointing to the right, positioned to the left of the word "Resources".

Resources

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Bower, Gordon H., and Michal C. Clark. "Narrative Stories as Mediators for Serial Learning." *Psychonomic Science*, vol. 14, no. 4, 1969, pp. 181–182.,

<https://doi.org/10.3758/bf03332778>

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Freedman, Jonathan L., and Scott C. Fraser. "Compliance without Pressure: The Foot-in-the-Door Technique." *Journal of Personality and Social Psychology*, vol. 4, no. 2, 1966, pp. 195–202., <https://doi.org/10.1037/h0023552>

Roghanizad, M. Mahdi, and Vanessa K. Bohns. "Ask in Person: You're Less Persuasive than You Think over Email." *Journal of Experimental Social Psychology*, vol. 69, 2017, pp. 223–226., <https://doi.org/10.1016/j.jesp.2016.10.002>

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→ Module 5 **BIG** Finish

In Summary...

- You can build momentum throughout the business development process by using four key skills:
 1. Building Everything Together
 2. Connecting Through Storytelling
 3. Asking for the Advance
 4. Overcoming Objections
- Build Everything Together with the client at every step of the process to keep them engaged and eliminate surprises.
- Leveraging storytelling will lead to much more memorable conversations and greatly enhance our most important communication points.
- Asking for the Advance is the number one way to speed up your process. And the likelihood of getting a yes increases 34x when you ask in person! Every advance is a win, and incremental asks throughout the process will predispose the client to saying “yes.”
- Objections can be anticipated and resolved throughout the business development cycle to help eliminate any last-minute hurdles. Leveraging the objection matrix can ensure that we consider all four quadrants when addressing objections.



→ FINAL ACTIVITY

Of the four skills in this module, which one do you think will help you the most and why?

Position Your Offerings To Be Chosen More Often

Use The Science Of Positioning To Win More

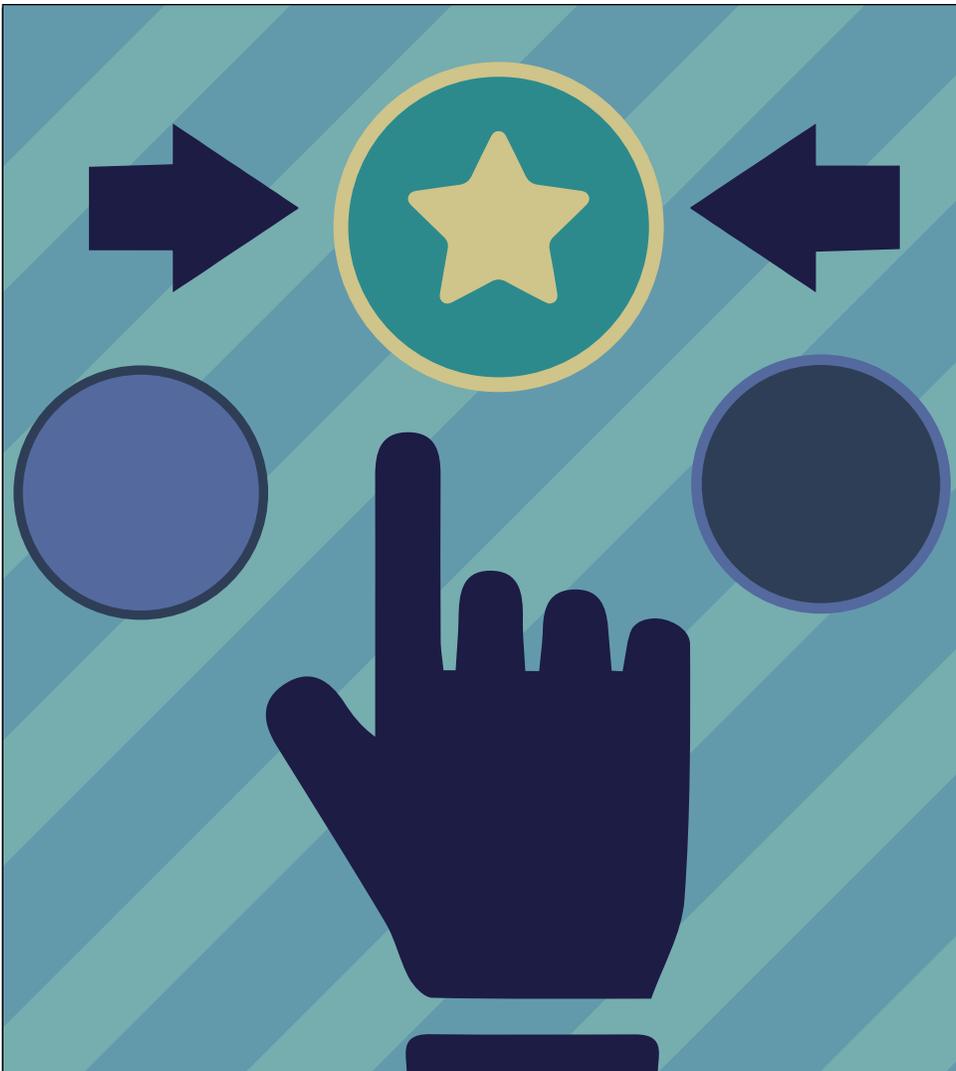
↓ MODULE OVERVIEW

Positioning is making it simple and easy for the decision makers to see how you're uniquely suited to work with them—why your offering is the best choice. It is most powerful at the contract level, where the decision is made. Positioning borrows from some of the most powerful principles of advertising and will become you and your team's mantra to communicate your one-of-a-kind value.

↓ OBJECTIVES

At the end of this module, you will be able to:

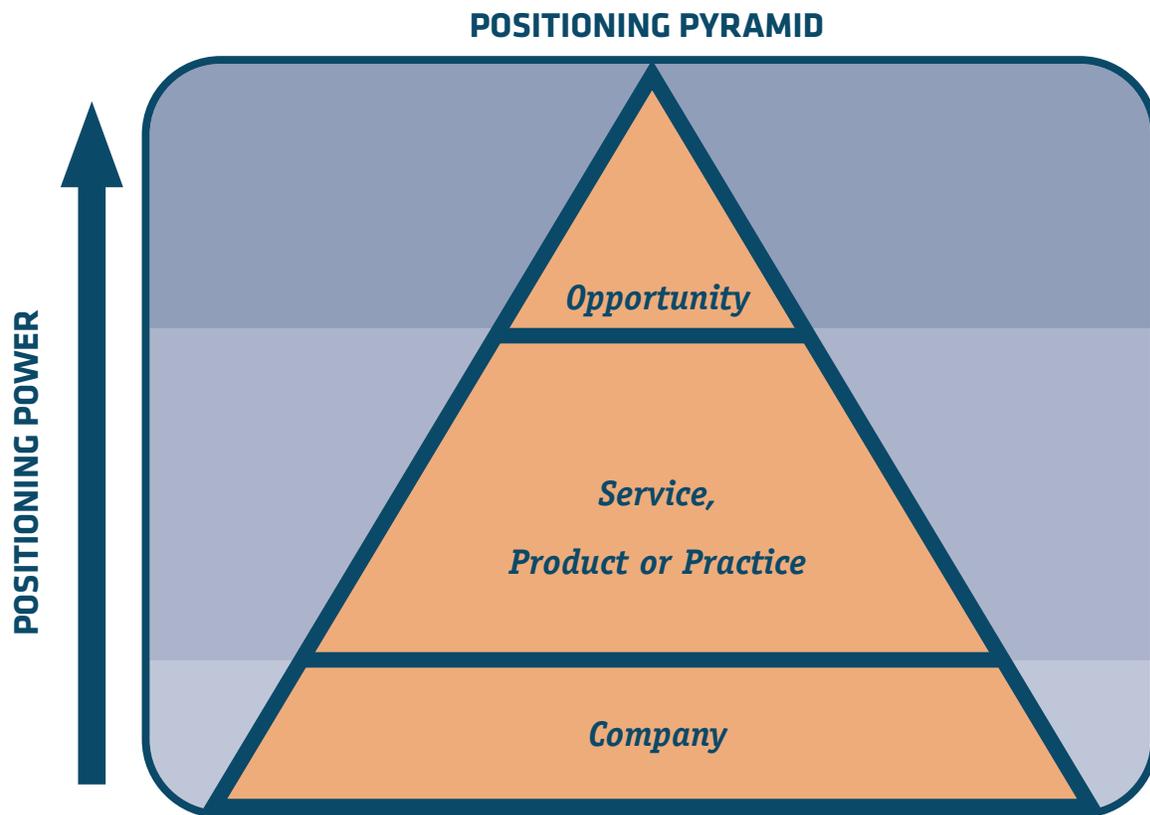
- ✓ List the five dimensions of Positioning and explain how a Positioning Statement is used
- ✓ Develop a Positioning Statement from a case study so you'll be prepared to use the framework in the real world





What's your biggest personal insights about the science of positioning in the business development process from marketing strategists Al Ries and Jack Trout?

➔ Positioning Has The Most Power At The Opportunity Level





What's your biggest personal insights from the two goals for what a positioning statement should consist of?

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What's your biggest personal insights about focusing on the client in your positioning statement from the research of Dr. Cynthia Cryder, Dr. George Lowenstein, and Dr. Richard Scheines?



What's your biggest personal insights about the focusing on three benefits in your positioning from Dr. Suzanna Shu, Dr. Kurt Carlson, Dr. Jeffery Router, Dr. James Friedrich, and Dr. David Fetherstonhaugh?



What is your biggest insights from the three pro tips to communicate effectively from the research of Dr. Petra Filkukova and Dr. Sven Hroar Klempe?

 **ACTIVITY → Create A Positioning Statement**

Your facilitator will instruct you on how you will work in teams for this exercise. You are tasked with creating a positioning statement as part of your pitch to win the business. You are not trying to come up with a final recommendation. You will be pitching the CFO and the VP of HR. You will have 2 minutes each to give your pitch. Use the space below to develop your positioning statement.

Case Study

The VP of HR at EM Financials wants to determine the cost-effectiveness of their in-house, employer-paid cafeteria. Before the recession, they ran the cafeteria at a loss because everyone thought it was better to keep the employees in the building for the entire day, rather than let them leave every day at lunch time and possibly miss phone calls from the brokers on Wall Street. The financial pressure of the recession has made the cost of running the cafeteria a candidate for their overall cost-cutting program for this year. Plus, the VP of HR thinks it's actually counter-productive to keep people in the building all day and make them eat at their desks.

The VP of HR and the CFO have different opinions about closing down the cafeteria. The VP of HR wants to keep it open as an employee benefit, but make it optional for the employees to stay in the building. He is thinking with empathy about all their employees and frequently mentions how they are feeling. The CFO wants to keep it open, but charge the employees for lunch, and make it mandatory that they stay in the building during lunch. She frequently quotes the exact costs of the cafeteria and that he needs to optimize working hours and productivity.

We are competing against IHCC (InHouse Catering & Consulting), the incumbent operator of the cafeteria. They will likely propose a solution to keep it open and have the company still pay for employee meals. We are a pure consulting firm and do not have the ability to operate the cafeteria like IHCC currently does. Plus, our validated employee engagement survey has been instrumental in uncovering the real opinions of the employees. It was given to all employees 3 months ago and we have some insightful data to share. Broad results have been shared with the EM Financials executive team, including the VP of HR and the CFO, but there wasn't enough time to discuss how the cafeteria impacts the results. We can also provide comparison data to the CFO on the true cost of employee dissatisfaction (the cost of losing valuable employees and having to replace them.)

This project is a great opportunity for us to further our relationship with EM Financials. They are issuing an RFP for a complete replacement of the current Financial System next quarter and we know we are the best-qualified firm to do that work for them. We just need to get a win with the CFO.

Data Input	Key Three Messages	Proof Points
Client Needs		
Thinking Styles		
Competitors' Strengths		
Our Strengths		
Boldness Needed to Win		



What's your biggest personal insights about pulling your positioning early and through everything?

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Resources

Ries, Al, and Jack Trout. *Positioning the Battle for Your Mind*. McGraw-Hill Education, 2014.

Cryder, Cynthia E., et al. "The Donor Is in the Details." *Organizational Behavior and Human Decision Processes*, vol. 120, no. 1, 2013, pp. 15–23.,

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Filkuková, Petra, and Sven Hroar Klempe. "Rhyme as Reason in Commercial and Social Advertising." *Scandinavian Journal of Psychology*, vol. 54, no. 5, 2013, pp. 423–431.,

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→ Module 6 BIGFinish

In Summary...

- Positioning Statements are client and opportunity specific.
- You want to create a clear and compelling positioning for all your major opportunities.

- A Positioning Statement simplifies how you help the client and focuses on the benefit to the client, not on accolades about you.

- A Positioning Statement focuses on the Key Three benefits. Three messages are more believable and more memorable.

- To communicate a Positioning Statement most effectively:
 - Get to one or two words per message
 - Use “So we can” or “so you can” language to differentiate how we can be helpful
 - Use rhymes, mnemonics, and alliteration where possible for maximum impact

- A Positioning Statement:
 - Reflects client needs
 - Appeals to the most important thinking styles
 - Differentiates you from the competitors’ strengths
 - Includes your strengths
 - Is bold enough and factual enough to move the business development process to the next step

- Create your positioning early and pull it through everything.

→ FINAL ACTIVITY

List one advantage you think a Positioning Statement will give you the next time you have an opportunity.

Talk About Money With Confidence

How To Use Mental Heuristics And Behavioral Economics To Get Paid What You're Worth

↓ MODULE OVERVIEW

Talking about money is sometimes the most stressful part of a professional's job, but it doesn't have to be. By understanding the psychology of how people think about money, you can use financial conversations to deepen relationships and charge the amount you want.

↓ OBJECTIVES

At the end of this module, you will be able to:

- ✓ Leverage financial conversations to win more and deepen relationships
- ✓ Explain why higher priced items are perceived to have greater value
- ✓ Explain the pros and cons of discounting
- ✓ Prepare an effective pricing proposal



ACTIVITY → Helping A Client Succeed

Your facilitator will divide you into teams. You are a member of a consulting firm with a particular expertise in designing cutting-edge electronic products.

Each team will need to submit a bid within the timing provided by the facilitator, typically within 8 minutes. You will be thrown out of the process if you don't submit your bid in time.

Each team's bid should have these five components:

1. **Team Name**
2. **Type of Bid. Options are:**
 - a. Time and materials,
 - b. Cost plus,
 - c. Fixed fee, or
 - d. No up-front costs but fees collected as a percent of future sales
3. **Fees before discount**
4. **Discount**
5. **Fees after discount**

You're being asked to bid on the design of a new product, a two-handled internet-connected cowbell. Here's the background.

The founders of the company created a one-handled internet-connected cowbell that can be rung each time a team member succeeds with an incremental advancement with a client. Settings can be chosen so that team members all across the globe can be notified when other team members ring the bell, which helps client teams celebrate their progress and build a winning team mentality.

The cowbells have been remarkably successful! The founders of the company designed the initial cowbells, built the supply chain, created the marketing and have sold 100,000 cowbells in the last year at \$1,000 each. The net margin on the original one-handled product is around 50% and the bulk of the sales have occurred in the last quarter, hockey-sticking their financial results. The sky's the limit. The company is extremely profitable and they are forgoing additional funding rounds and planning for an IPO next year.

The owners are worried about other electronic makers copying their success so they want to develop new products quickly. That's the reason for this request for proposal. They're going to choose one of the firms bidding to modify the original cowbell to create the world's first two-handled internet connected cowbell.

They anticipate rapid growth of the two-handled cowbell, roughly selling as many as 100,000 unit per year in the next year, 200,000 the next year, and 300,000 in the third year. They're likely going to price the two-handled cowbell at \$1,500/unit and anticipate 50% net margins. They are handling getting their supply chain, marketing, and sales ready and don't need help with that. They need to have someone help them with two-handled design. They can even share the original cowbell CAD drawings to start from. You're very excited about this project and believe getting in early with this company will lead to lots of design work in the future.

The founders view all the bidders will be well-suited to do this design work and will make their selection only using the specific answers to the five questions in the bid above.

You can reach out to your facilitator at any time to ask any question you'd like about the process or your bid.

You should submit your bid on a scrap piece of paper or electronically based on your facilitator's directions.



What's your biggest personal insights about why talking about money is important and the impact of bad experiences influence the money talk experience from the research of Dr. Roy Baumeister about?

A large, empty rectangular box with rounded corners, intended for the user to write their response to the question above.

→ The Seven Pricing Principles Of Rainmakers

- 1 Embrace Pricing**
- 2 Anchor On Value**
- 3 Emphasize What Costs More Is Worth More**
- 4 Make Everything Cost Something**
- 5 Build Everything Together, Looking For Mutual Wins**
- 6 Use Good-Better-Best Options To Show Value**
- 7 Be Ready For One Last Thing**



What's your biggest personal insights from the Seven Pricing Principles of Rainmakers combined with the research of Adrian Furnham, Hua Chu, Dr. Adam Galinsky, Harvard Business Review, Dr. Maria Cronley, Dr. Devon Delvecchio, Dr. Sanjay Puligadda, Dr. Malia Mason, Dr. Terri Kurtzberg, Dr. Karen O'Quinn, Dr Joel Aronoff, Dan Ariely, and Dr. Jerry Burger?

OPTIONAL ACTIVITY → Offer Three Options

Work in teams to come up with three pricing options for the Positioning Case Study activity from GrowBIG® Module 6: Position Your Offerings Uniquely To Be Chosen More Often. Assume that Good Option is to conduct the study and is priced at \$50,000. How could you design all three options?

Option	Description	Cost
1 Good	Conduct research and provide a recommendation for operation of the client's in-house cafeteria.	\$50,000
2 Better		
3 Best		



What's your biggest personal insights about the Grow BIG Pricing Process?

A large, empty rectangular box with rounded corners, intended for writing a response to the question above.

 **OPTIONAL ACTIVITY → Prepare For A Pricing Conversation**

Think of a project you have coming up or would like to have and use the following form to prepare. Your facilitator will give you instructions on timing.

1. Anchor

Write in your Value Anchor. If needed, also add your Initial Price Anchor.

2. Decide On Framework

Choose a one-option or three-option framework and fill it in below.

If One Option	Description	
	Cost	

If Three Options	Option	Good	Better	Best
	Description			
Cost				

3. Prepare

a. Write how you can **Embrace pricing**, engaging in the conversation early and often.

b. Write how you can confidently discuss and **Anchor on value** as you talk about your solution.

c. Write how you can **Emphasize what costs more** is worth more given the specifics of what you're proposing.

d. Write how you'll handle any suggested changes in pricing or scope, **Making everything cost something**. Specifically think through how you'll handle a request for a discount.

e. Pick a person you admire in how they discuss money with clients and write their name down here. Write what you want to emulate in how they **Build everything together, looking for mutual wins**.

f. In longer and more intense negotiations, **Be ready for one last thing** to offer in exchange for closing the deal. Write your approach here.

A blue arrow pointing to the right, positioned to the left of the word "Resources".

Resources

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→ Module 7 **BIG**Finish

In Summary...

- Talking about money is a healthy part of a relationship. You should embrace talking about it, make it easy for your clients to talk about money with you and use it as a competitive advantage!
- Use a Value Anchor or Initial Price Anchor to relate all conversations about fees and pricing.
- Price sends the strongest signal about your quality. Charge what you're worth and eliminate or minimize discounting as much as possible.
- Your price should reflect every significant value change as you Build Everything Together. If scope changes in any way, something else must change.
- If the client isn't exactly sure of that they want, offer three options in a Good-Better-Best framework: one to meet their needs to get started, one that meets the full scope or what you've discussed, and one that is the best-value, highest priced and offers the client the smartest option.
- Plan for one last thing you are willing to concede to close the deal.



→ FINAL ACTIVITY

What is your #1 insight from this module?

Creating Demand Through A Relationship Advantage

Use The Science Of Likeability And Top-Of-Mindedness To Create A Relationship Advantage

↓ MODULE OVERVIEW

The Raving Fan is the ultimate prize for a Rainmaker. Once you have created a base of Raving Fans, business comes to you! This module introduces a systematic method for converting your prospects and clients into Raving Fans.

↓ OBJECTIVES

At the end of this module, you will be able to:

- ✓ Describe the Path to Raving Fan and identify your current and targeted Raving Fans
- ✓ Develop a list of preferred contacts in whom you will invest time to create Raving Fans
- ✓ Develop a list of assets you can use to increase positive client interactions
- ✓ Develop a systematic approach to maintaining regular contact with your clients and prospects





What's your biggest personal insights about why relationships matter and turning soft skills into hard results from the research of Dr. Robert Cialdini?



What's your biggest personal insights about the five drivers of likability from the research of Dr. Jerry Burger, Dr. Anna Brack, Dr. Martin Benkenstein, Gustav Fechner, Dr, Adam Grant, and David B. Strohmetsz?

 → ACTIVITY

Make a list of the people who are most important to your business development success this year. Next, place a check mark next to the three you spend the most time with. Finally, place an asterisk next to the three who are MOST important to your success.

→ Use Likeability To Create Raving Fans

The Path To A Raving Fan – Roadmap

Your Relationship Pipeline Is As Important As Your Opportunity Pipeline

In most firms, everyone focuses on the business development pipeline. This is definitely important and needed. But, people buy things from people, not companies. Focusing on your *Raving Fan* Pipeline is essential. It's the strongest leading indicator of your future business development success.

Raving Fan To Be: Shorten The Travel Time To Raving Fan

Using this model, a professional can both proactively and appropriately invest in their clients and prospects. We've seen Rainmakers shorten the travel time to Raving Fan from years (if the steps are left to chance) to as little as three months.

	Target	Acquaintance	Curious Skeptic	New Client	Solid Working Relationship	Trusted Advisee	Raving Fan!
Core Definition	Someone you want to know, but don't	Introduction has been made, but not much else	Client knows you are a potential resource, but is skeptical enough they haven't hired you yet.	Client has paid for some products or services, but no ongoing relationship exists (yet!)	A solid, ongoing work relationship exists, but doesn't transcend outside the paid relationship	The relationship is much broader than the paid relationship Helpful advice is frequently asked for and proactively given on work and/or nonwork topics Help to professional is given when asked	Client is a wildly Raving Fan about your products or services and proactively looks to help you, the professional
Receptivity to Proposed Solutions	Little	Possibly	Usually	Almost Always	Always	Definitely	Will often propose solutions themselves
Receptivity to Referrals	No	No	No	Possibly, if referral process in GrowBIG® Module 15: Foster New Relationships: Broaden Out and Ladder Up is followed and win/wins created	Possibly, if referral process in GrowBIG® Module 15: Foster New Relationships: Broaden Out and Ladder Up is followed and win/wins created	Yes, but usually done reactively by clients	Definitely and many times done proactively by clients



What's your biggest personal insights about managing your relationship pipeline through a Protomoi List and the types of relationships on it from the research of Dr. Adam Grant and Dr. Daniel Levin?

Empty response area for writing insights.



What's your biggest personal insights about making outreach easy with an asset list from the research of Dr. Adam Grant, Dr Jon Jecker, and Dr. David Landy?

A large, empty rectangular area with rounded corners, intended for a user to write their response to the question above. The area is white with a thin black border.



What's your biggest personal insights about consistent communication from the research of Dr. Sharma and Dr. Patterson?

A large, empty rectangular area with rounded corners, intended for writing a response to the question above.

A blue arrow pointing to the right, positioned to the left of the word 'Resources'.

Resources

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→ Module 8 **BIG**Finish

In Summary...

- Shoot to provide exceptional value, in both work and nonwork ways, to overcome the past negative history your clients might have working with others that do what you do.
- Strive to provide valuable interactions that create a Raving Fan “sales force” excited to help you succeed.
- Develop and maintain a Protemoi List of contacts. These are your first among equals.
- In developing your Protemoi List, focus on who you’d like to invest in, not just who you do now.
- Develop and maintain a list of valuable assets that you can provide to your Protemoi contacts.
- Find a frictionless way to capture Assets.
- Use a systematic approach to providing valuable outreach—outside of what you’re expected to do—to each contact on your Protemoi List at least once a month



→ FINAL ACTIVITY

What are you most excited about after working through this module?

Creating Demand Through Your Expertise

Leverage The Science Of Giving To Generate Traction For The Work You Want

↓ MODULE OVERVIEW

Creating demand with your expertise begins with giving—giving your insights and expertise in ways that create traction in the direction of getting hired for the work you want. Giving is easy, but, but giving in a way that actually

↓ OBJECTIVES

At the end of this module, you will be able to:

- ✓ List the steps in the Give-to-Get model
- ✓ Name the criteria for a great Give-to-Get
- ✓ Develop a list of Give-to-Gets you can use with your prospects and identify the potential revenue for each
- ✓ Design a specific Give-to-Get you can use to create demand for the work you want to win



→ Help Both You And Your Clients By Taking Control Of Your Growth

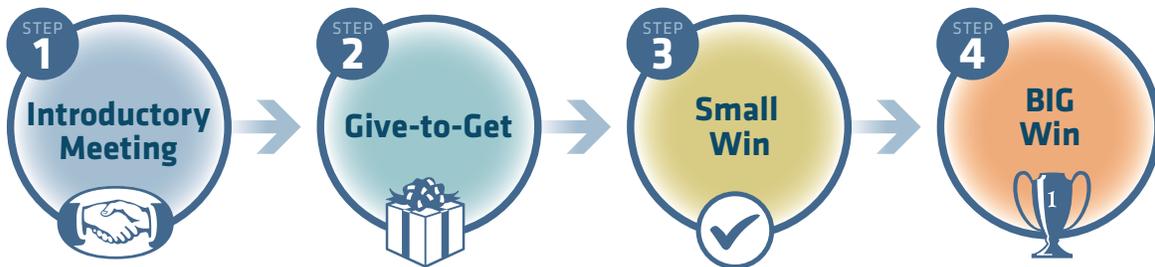
Comments from a Fortune 100 Chief People Officer regarding business development:

Vendors should not have **no value** schmooze people as client managers. You shouldn't even use the term account manager or managing consultant in an introductory meeting. It's a big red flag to me that here comes **no value time**.

Show me you're willing to invest in us. Do your homework and come with a gift of knowledge or something that demonstrates that you value my time and the relationship.

Give both your company-oriented ideas and ideas that don't directly result in work for you. Remember, I'm looking for someone to help me solve my problems, not someone for me to help make their BD revenue goals for this quarter.

→ Use The Give-To-Get Model To Create Demand



→ Three Important Criteria of Successful Give-To-Gets



→ Using Dr. Robert Cialdini's Science of Persuasion to Succeed with Give-To-Gets

The science behind Give-to-Gets is amazing.

We've quoted Dr. Robert Cialdini in targeted ways in prior modules and his science of influence applies holistically to Give-to-Gets. In his classic book *Influence, The Science of Persuasion* he synthesized hundreds of studies and documented the six major things that influence the human mind.

The Give-to-Get model is the only business development technique we've seen that can harness all six elements of influence and feel great to the person you're investing in!

Let's review each one.

Likeability

People do more business with those they like. Working with a client to solve their problems will give you dozens of shared interests and other commonalities to help build a connection. Give-to-Gets establish a personal connection between expert and client.

Reciprocity

People tend to return a favor. Starting a relationship with a gift of your expertise builds goodwill that's usually returned in multiples.

Scarcity

Scarcity creates demand. Researchers Drs. Brehm & Weintraub additionally found that desire to get what is scarce shows up in children as young as age two! Your time is valuable. You can't give away your expertise or products endlessly. It's appropriate for you to point out how many Give-to-Gets of a certain kind you can offer to help the client understand that not everyone gets one. It's a big deal for them and for you.

Authority

People tend to trust experts. Transitioning from "talking about what you do" to "doing what you do" provides an important experience for your prospect. Give-to-Gets let you demonstrate your expertise and prove your value by solving a client's problems alongside them.

Social Proof

People like the safety of doing what they can see others are doing. Inviting several key people to a Give-to-Get session builds "social proof" inside the organization. A properly designed Give-to-Get impacts multiple decision makers at once.

Commitment and Consistency

People tend to continue down a path they've begun. Making the next step easy, without the hurdle of a contract, gets things moving smoothly. Give-to-Gets get your prospects working with you fast, providing a simple step on a path to purchasing.

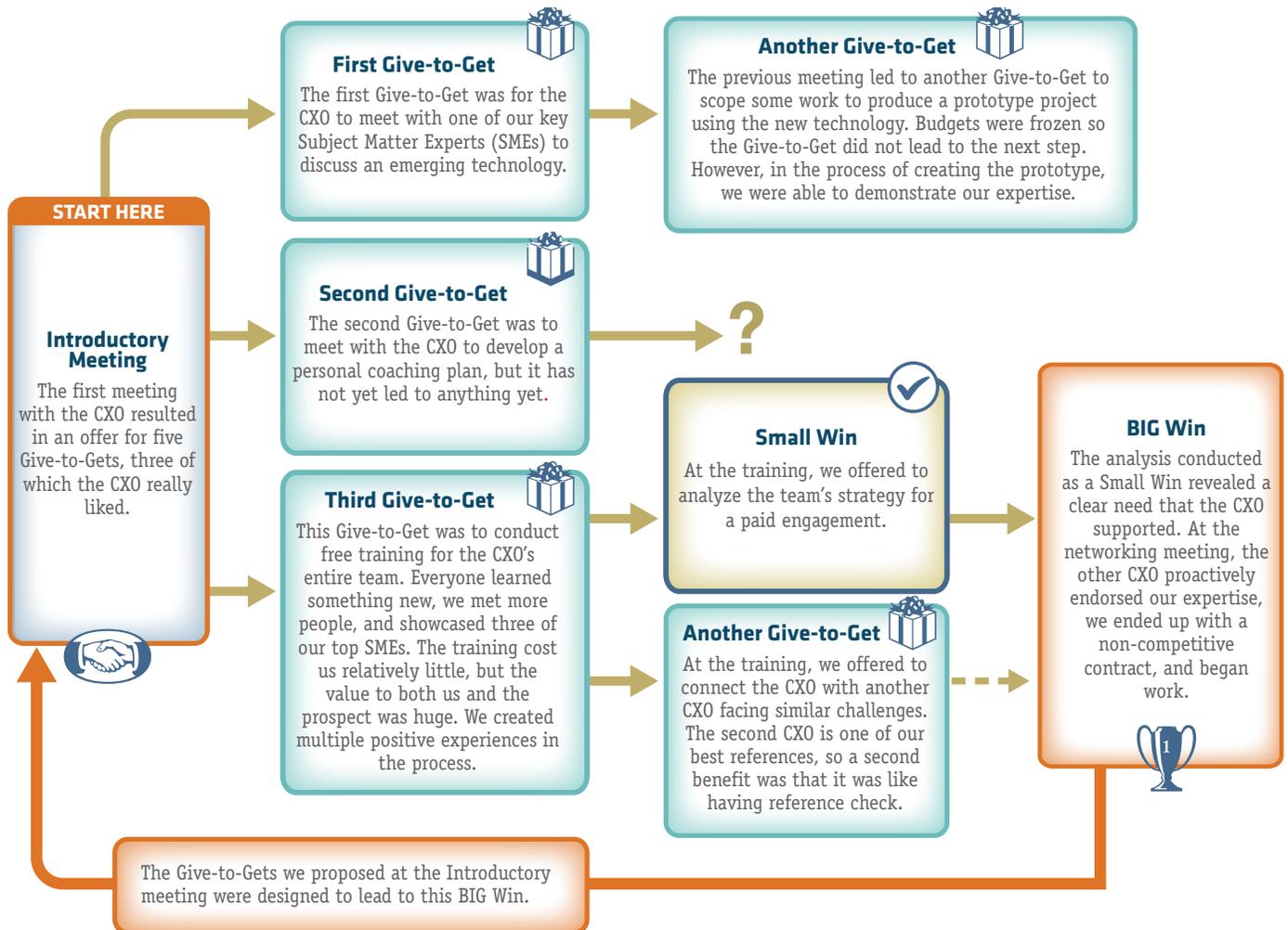
SIGNIFICANT SCIENCE

 Insight	 Key Researchers	 BIG Takeaway
<p>Likeability: We want to do more business with those we like, and they like those they have things in common with</p>	<p>Dr. Jerry Burger</p>	<p>The Give-to-Get process gives us access, so you need to find and reinforce commonalities</p>
<p>Reciprocity: We want to repay those that give to us</p>	<p>Dr. Dennis Regan</p>	<p>People pay attention when receiving gifts and want to repay them—they're especially important in the beginnings: new relationships and/or new topics. You need to give first to get attention, access, and traction</p>
<p>Scarcity: We want more of what there is less of</p>	<p>Dr. Amram Knishinsky (business development) and Brehm, S. S., & Weintraub, M. (children)</p>	<p>People want more of what there is less of, so you need to pick Give-to-Gets that the client will feel is special</p>
<p>Authority: We trust authority figures, especially in times of stress</p>	<p>Dr. Stanley Milgram</p>	<p>It's stressful to try new partners or offerings, so you need to bring in our best experts on Give-to-Gets so we can display authority</p>
<p>Social Proof: We want to do what others want to do</p>	<p>Dr. Muzafer Sherif</p>	<p>You'll move the farthest the fastest if all the decision makers are in the room to experience the Give-to-Get</p>
<p>Commitment and Consistency: We tend to continue down paths we begin</p>	<p>Dr. Jonathan Freedman</p>	<p>The fastest way to start something big is with something small, but in the direction of where we want to go. Design your Give-to-Gets backwards, starting with the Big Win you want and working backwards through the Small Win to the perfect Give-to-Get</p>



What's your biggest personal insights about the use of the science of influence from the research of Dr. Robert Cialdini, Dr. Jerry Burger, Dr. Dennis Regan, Dr. Armram Knishinsky, Dr. Stanley Milgram, Dr. Muzafer Sherif, and Dr. Jonathan Freedman?

➔ How Give-To-Gets Work In Real Life



 **ACTIVITY → Build Your High-Level Give-to-Get Strategy**

In the space below, consider the following:

1. Identify the top three types of work you'd like to create demand for—these are your BIG Wins.
2. Identify the Small Wins that you can preferably get paid for that would lead to that BIG Win. Examples might be getting introduced to other decision makers or getting hired for something that would lead to the larger purchase you want.
3. Think about a Give-to-Get idea that would naturally lead to the Small Win you designed

BIG Win: The Work You Want	Possible Small Wins	Give-to-Get Idea

→ Your Key To Success: Avoid Give-To-Gives

We jokingly call investments you make that don't convert to any real business Give-to-Gives.

Give-to-Gives are investments that may have helped you deepen the relationship but didn't convert and create demand in an optimal way or in a way worthy of the investment you made.

Here are the top 3 ways to avoid Give-to-Gives, which will help make your Give-to-Gets successful:

1. **Don't give away too much.** Many professionals get excited about their Give-to-Gets and give away what they could charge for in the Small Win. Size your Give-to-Get to be "just enough" so the client feels helped and realizes they need your assistance. Everything after that should be paid or have some significant advancement like a meeting with a VIP at a higher level.

You can size the Give-to-Gets relative to the amount of paid work in the future. A Give-to-Get for a \$500,000 piece of work should be much smaller than one for a \$5,000,000 one.

Scientifically, this keeps our Likeability and Reciprocity while reserving your Scarcity.

Key point to remember: You control what you give away. Pick your Give-to-Get at "just enough" for the client to realize they need your help.

2. **Get the right people in the room.** Great Give-to-Gets are valuable—and deserve senior leaders' attention. Bring in your best people and do your work up front. This will trigger Scarcity and Authority to get the right people in the room, helping you with Social Proof.

Key point to remember: Your Give-to-Gets will be succeed more often if all the decision makers are in the room. If you're adding tremendous value, you should ask for them to be there.

3. **Reserve time at the end to discuss next steps.** Many professionals get excited about their own value and try to pack four hours of content in a one-hour meeting. This doesn't work because the client has to figure out what to do with the information without your involvement, including figuring out what's next.

YOU want to be the one helping them figure out what's next!

Presentation guru Pat Quinn says a great presentation is like a sidewalk—it leads to one simple decision. Great Give-to-Gets are similar. You want to be in the room to suggest the next step, ask for it, overcome any objections and shape the deployment and timing of that next step, which is the Small Win.

That's how you'll get Commitment and keep things moving forward.

Cover less. Leave more time to talk about the future. Get to the next step.

Key point to remember: Save time to discuss next steps while you are with each other. Bring up what you think they should do next, making it easy to discuss taking the next step with you.

This science was covered in **GrowBIG® Module 5: Build Everything Together to Get to the Yes** in the Asking for the Advance section but deserves a mention here because this 3rd misstep happens so often. Don't make this mistake!

Drs. M. Mahdi Roghanizad and Vanessa K. Bohns found that a face-to-face ask was 34x more likely to get a yes than an email ask.

34x!

SIGNIFICANT SCIENCE

 Insight	 Key Researchers	 BIG Takeaway
<p>Suggesting, asking for and talking through the next step in person has a 34x chance of getting a yes than doing the same over email</p>	<p>Drs. M. Mahdi Roghanizad and Vanessa K. Bohns</p>	<p>Even if that means covering less content, make time and ask for the next step while you're still together</p>



What's your biggest personal insights about avoiding give-to-gives and the super power the of face to face ask from the research of Dr. M. Mahdi Roghanizad, and Dr. Vanessa K. Bohns?

A large, empty rectangular area with rounded corners, intended for writing a response to the question above.

ACTIVITY → Effectively Design The Perfect Give-to-Get

Use the job aid below to document how to design the perfect Give-to-Get. You can choose one currently used by your organization, or get more specific for one of those you designed in the prior exercise. Begin by working backwards from the desired BIG Win you are driving towards to the probable Small Win that can lead to it. Then incorporate each of the six drivers of influence into that Give-to-Get. Be clear on the commitment needed from the client at the end of the Give-to-Get. Lastly, design a high-level list of topics to cover using a Whole Brained® approach.

Give-to-Get Name:	
Approximate Amount of Time You'll Have in the Give-to-Get Meeting:	
Desired associated BIG Win:	
Probable Small Win that leads to BIG Win:	
Lever of Influence	How to Incorporate in the Give-to-Get Experience
Likeability	
Reciprocity	
Scarcity	
Authority	
Social Proof	
Commitment and Consistency	

Commitment required from the client you'll need to get to the next step:

One sentence framing of Give-to-Get, emphasizing the most appropriate HBDI® Thinking Styles (Analytical, Practical, Relational or Experimental):

Topics to cover to Create the Perfect Client Experience:

Analytical

Experimental

Practical

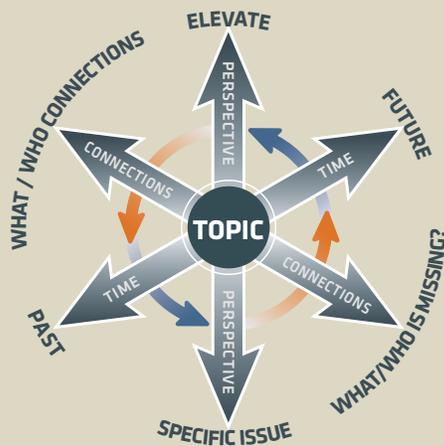
Relational



What's your biggest personal insights about the pro tips for getting a yes when you really need one from the research of Dr. Stephen Worchel and Dr. Jerry Lee?

A large, empty rectangular area with rounded corners, intended for the user to write their personal insights.

Once you've identified your white space, schedule meetings with your clients to ask about their key priorities. Use the Gravitas model from **GrowBIG® Module 3: Listen and Learn for a Triple Win** to design your questions. Once there, listen for their priorities in their words then suggest Give-to-Gets to be helpful to them.



This is one of the fastest ways you can create demand. These clients already know and trust you. You've got areas of expertise many of them need. Have that conversation, use Would it be helpful if...? to offer Give-to-Gets and you're off to the races.

A blue arrow pointing to the right, positioned to the left of the word "Resources".

Resources

Cialdini, Robert B. *Influence: The Psychology of Persuasion*. Collins, 2007.

Burger, Jerry M., et al. "What a Coincidence! the Effects of Incidental Similarity on Compliance." *Personality and Social Psychology Bulletin*, vol. 30, no. 1, 2004, pp. 35–43., <https://doi.org/10.1177/0146167203258838>

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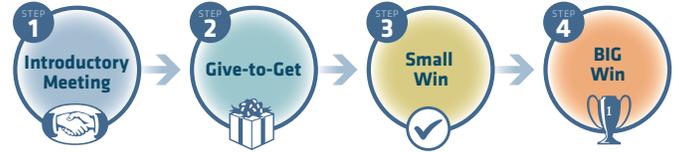
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→ Module 9 BIGFinish

In Summary...

- You can create demand with your expertise by offering Give-to-Gets, which are valuable “tastes” of what it’s like to work with you.
- The Give-to-Get must be easy for you, have value for them, and will likely leads to a next step.
- A Small Win is some kind of significant advancement, usually significantly moving relationships or opportunities forward.
- Always work backwards from the BIG Win to define the appropriate Small Win and Give-to-Gets.
- Remember the six drivers of influence when designing and offering your Give-to-Get.
- Frame your Give-to-Get with the thinking style of your client or prospect.
- Consider using a one-page document when you are creating demand for a huge opportunity and you are not sure what Give-to-Get to offer.



→ FINAL ACTIVITY

Describe the value you think your clients will perceive in the Give-to-Get model. How do you think their opinion of you will change?

Plan And Execute Your BD Meetings To Make Positive Progress

Efficiently Plan And Execute Successful Business Development Meetings, From Informal Introductions To High Stakes Finalist Presentations

↓ MODULE OVERVIEW

Big things happen in meetings. Big advances in opportunities. Big advances in relationships. Big decisions. You'll succeed or fail based on your preparation—this module will help you and your team how to efficiently plan for success and be ready for anything thrown your way.

↓ OBJECTIVES

At the end of this module, you will be able to:

- ✓ Explain the three things that impact meeting effectiveness
- ✓ List the six steps in the Dynamic Meeting Preparation process
- ✓ Complete a Dynamic Meeting Preparation form to prepare for a meeting



→ The Importance Of Meeting Preparation

1

Having intentionality about the meeting's purpose

2

Creating an enjoyable experience that drives positive progress

3

Deciding on a clear next step that everyone is looking forward to



What's your biggest personal insights about the three meeting sciences from the research of Dr. Edwin Locke, Dr. Rachel Adler, Dr. Teresa Amabile, Dr Lehmann-Willenbrock, Dr Vanessa Bohns, Dr Jonathan Freedman, Dr. Donald A. Redelmeir, Dr. Joel Katz, and Dr. Daniel Kahneman?

ACTIVITY → Prepare For A Meeting

Prepare for an upcoming meeting that you have scheduled or would like to schedule. Document your plans for each of the six items in the Dynamic Meeting Preparation process.

Meeting Attendees and Thinking Styles

Name	Analytical	Practical	Relational	Experimental	Buy-in Priority (ROI, Safety, Connectivity, Strategic Fit)

Goal

What do you want to advance? Business development? Relationships? Both?

Frame The Goal For The Buyer

How would you open the meeting by describing the meeting's goal? Do this in a way that is in everyone's best interest.

Prepare To Be Flexible

What could go wrong? How will we adapt? Plan for potential changes in timing, attendees and anything else.

Plan for what could go wrong: timing

Plan for what could go wrong: attendees

Plan for what could go wrong: other

Engage with Questions

Tough questions they may ask (From the Resolving Objections Matrix)

1

2

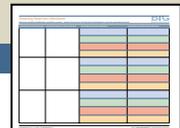
3

Questions we might ask them: (From the Gravitas Model)

1

2

3



Decide On Content Using Thinking Styles

What content should be included? How can we create a Whole Brained® Experience?

Analytical	Experimental
Practical	Relational

Design The Experience

What order and timing makes the most sense using the content above?

Timing	Content

Asset To Bring



What's your biggest personal insights about how to conduct Whole Brained Research for a meeting?

A large, empty rectangular box with rounded corners, intended for writing a response to the question above.

A blue arrow pointing to the right, positioned to the left of the word "Resources".

Resources

Locke, Edwin A., et al. "Goal Setting and Task Performance: 1969-1980." *Psychological Bulletin*, vol. 90, no. 1, 1981, pp. 125-152., <https://doi.org/10.1037/0033-2909.90.1.125>

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→ Module 10 **BIG**Finish

In Summary...

- Big decisions are made in meetings. Prepare so you get the most out of meetings.
- Three things impact meeting effectiveness: intentionality about its purpose, creating an enjoyable experience that drives progress, and agreeing on clear next steps everyone is looking forward to.
- Have a single goal and frame it for the buyer so that it clearly communicates that it's in everyone's best interest.
- Prepare for the expected and unexpected with the Dynamic Meeting Preparation Process.



→ FINAL ACTIVITY

In what ways do you expect your meetings to be different if you follow the guidelines in this module?

Craft And Execute Client Growth Plans To Grow Your Impact

How To Get Your Client Team Strategically Aligned And Executionally Streamlined To Grow

↓ MODULE OVERVIEW

Client teams almost always have a lot of upsides. If you want your client work to grow, you'll need to get the team aligned on a growth strategy, then execute tactically in a way that works. This module will teach you a five-step process to do exactly that, in a way that's exciting, mutually beneficial for you and your client and fun for you and your team.

↓ OBJECTIVES

At the end of this module, you will be able to:

- ✓ Describe the anatomy of a great client plan
- ✓ Assess the current state of a client relationship
- ✓ Define a desired future state of a client relationship
- ✓ Develop high-level strategic and tactical plans to grow your selected client relationship





What's your biggest personal insights about the external and internal headwinds against client business development growth and the impact of the self-enhancement basis from the research of Dr. Adrian Furnham, Dr. Hua Chu Boo, Dr. Victor Ottai, Dr. Erika Price, Dr. Chase Wilson, and Dr. Nathanael Sumaktoyo, Dr. Richard Robins, and Dr. Jennifer Beer?

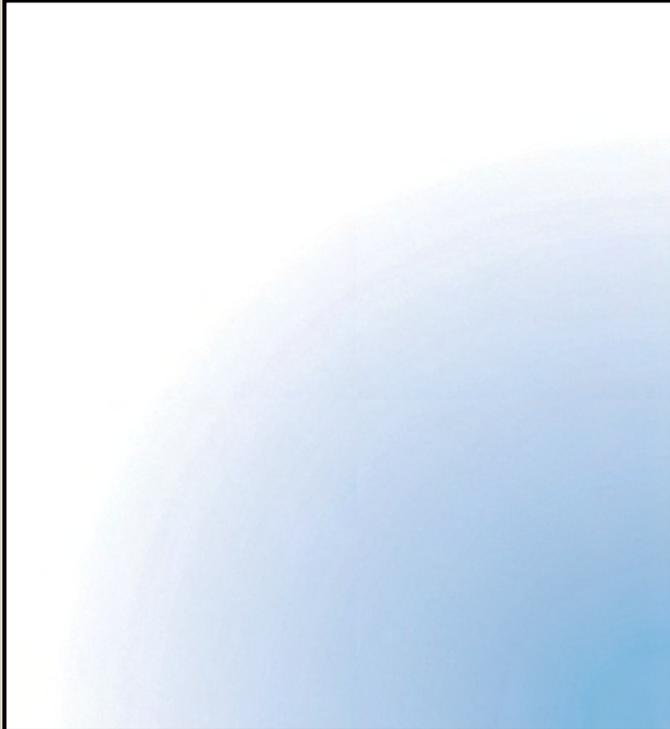
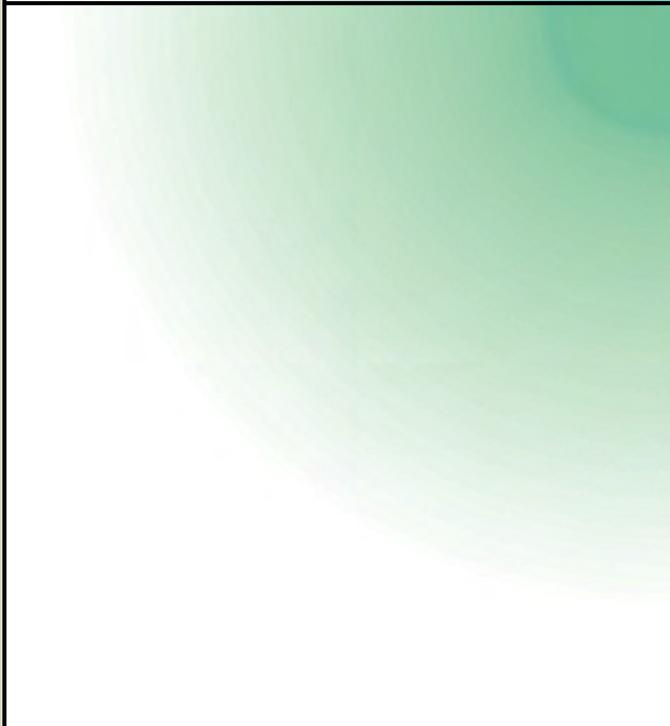
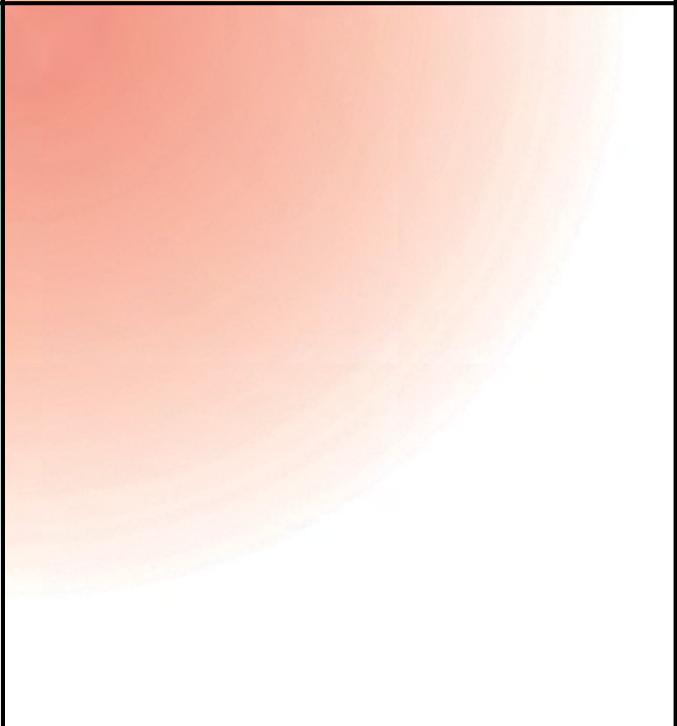


What's your biggest personal insights about the anatomy of a great client plan from the research of Dr. Edwin Locke and Dr. Teresa Amabile?

 **ACTIVITY → Assess Your Current State**

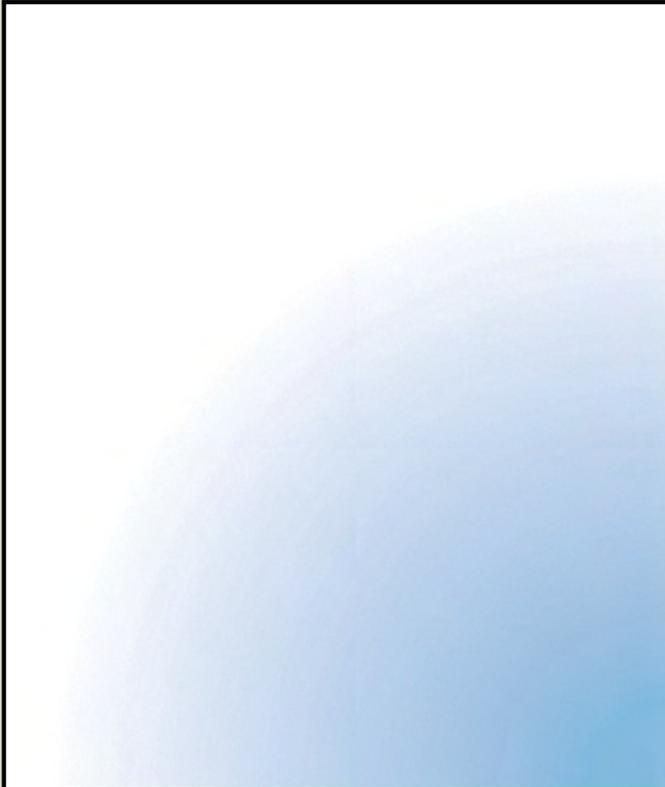
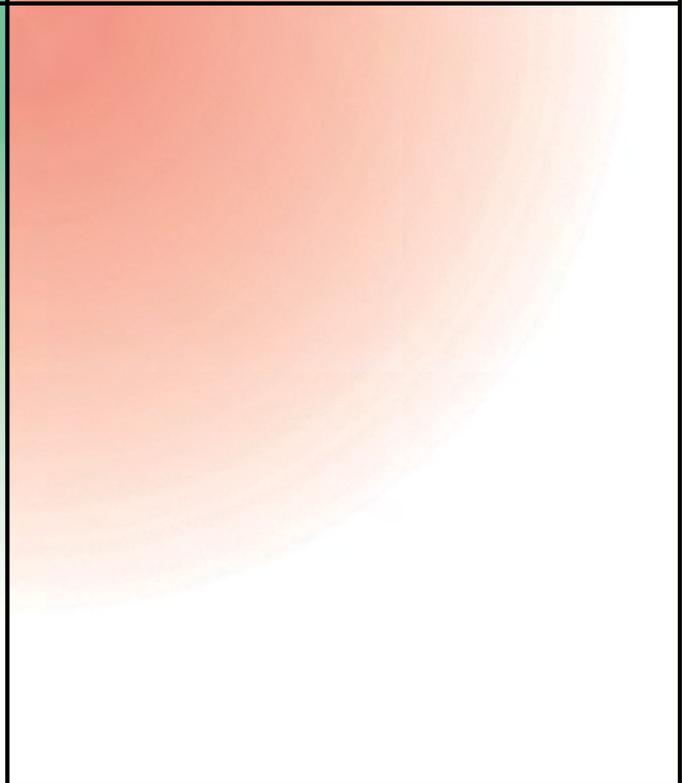
Assess the Current State of business development with your clients and prospects using the Whole Brain® Walk Around below and using the standard or optional questions you think will work best for your team.

Remember the pro tip regarding the Current State. The fastest way to speed up your client planning meetings is to fill out and circulate the Current State assessment ahead of time. That will get you focused on the one thing you can change—the future!

 **ACTIVITY → Craft Your Future Vision**

Describe the Future Vision with your client using the Whole Brain® Walk Around below.

 **ACTIVITY → Develop Your Strategic Themes**

Using the examples you've been given as a guide, develop three Strategic Themes for your client. These should summarize what the team wants to focus on to get from where you are today to where you want to be.

Theme 1

Theme 2

Theme 3

 **ACTIVITY → Develop Your To Dos**

Once your holistic strategic themes are created, it's time to get tactical with To Dos. While your themes are important and will drive your team's focus, you need to get detailed to develop To Dos. The easiest way to do this is to create a matrix using the following columns:

WHY Describe the link between this action and a Strategic Theme	WHAT Write what will be done	WHEN Document the due date for this specific step	WHO Pick ONE owner

 **ACTIVITY → Create Your To-Don't List**

Have you and your team fill in the following chart to define your To Don't List.

To Don't Items To Avoid Or Minimize	Total Hours Saved Per Year Across The Entire Team
Grand Total Hours Saved →	

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Resources

Locke, Edwin A., et al. "Goal Setting and Task Performance: 1969-1980." *Psychological Bulletin*, vol. 90, no. 1, 1981, pp. 125-152., <https://doi.org/10.1037/0033-2909.90.1.125>

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→ Module 11 **BIG**Finish

In Summary...

- Client planning is essential to overcome the many external and internal headwinds against client growth.
- Your Current State assessment is important because it will give you and your team a brutally honest assessment of where things stand now.
- Your Future Vision will create an inspiring destination for you and your team to work towards a year from today.
- Your three Strategic Themes will give you high level things to emphasize to reach your goals.
- Nothing happens with action. Building and consistently executing your To Do List is where the magic happens.
- Develop a To Don't List to reduce the time spent on activities that aren't as productive as tasks that will move your Strategic Themes forward.
- Launch the plan at a Team Meeting and execute the plan through a series of future-focused, ongoing meetings.



→ FINAL ACTIVITY

What do you consider to be the most difficult part about Strategic Planning and why?

Which of the tools or tactics from this course will be most useful in reducing that difficulty and why?

Build Powerful BD Habits

Hack Your Own Habits To Grow Your Book Of Business And Deepen Relationships, Even When You're Really Busy

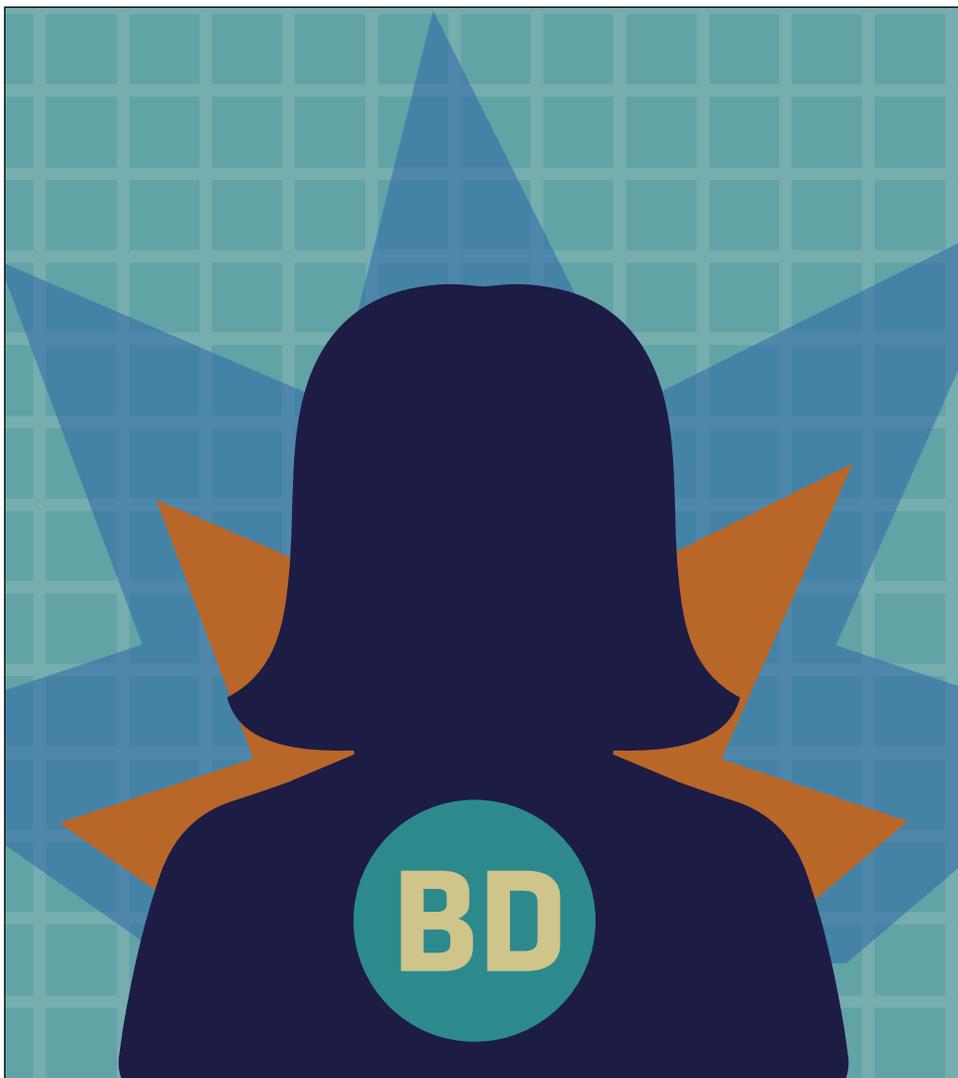
↓ MODULE OVERVIEW

You must build and maintain consistent momentum to be a successful rainmaker, even when you're busy. Just like staying in shape, consistently doing a little bit all the time is far superior to doing nothing for months and then "jumping back into it" for a few weeks. Balancing and integrating business development into your busy schedule is what works, and this module will help you develop a plan that works for you.

↓ OBJECTIVES

At the end of this module, you will be able to:

- ✓ Describe the anatomy of a great client plan
- ✓ Assess the current state of a client relationship
- ✓ Define a desired future state of a client relationship
- ✓ Develop high-level strategic and tactical plans to grow your selected client relationship



→ Pipeline Calculator

		ONLY change these variables
1	What is your <i>annual business development goal</i> ?	\$2,000,000
2	Of all client touch points (including those that are purely being helpful and not commercially related), what percentage of them should be proactively creating demand for our commercial opportunities?	10%
3	What percentage of suggested commercial conversations on a new topic <i>actually occur</i> ? Be sure to include conversations both you and your clients instigate.	10%
Moving from Listen & Learn to Creating Curiosity		
4	In what percentage of these meeting <i>does the client actively engage in building the work together</i> with you?	50%
Moving from Creating Curiosity to Build Everything Together		
5	What percentage of the time do these conversations <i>result in a formal proposal</i> ?	50%
Moving from Build Everything Together to Gain Approval		
6	What is the <i>average dollar value</i> of your proposals?	\$100,000
7	What percentage of the time <i>do you win</i> when you've submitted a formal proposal?	50%
Moving from Gain Approval to Land & Expand		

To meet your annual sales goal, you will need to have:

16,000	Total client touch points needed
1,600	Suggested meetings
160	Meeting Occurred
80	Client actively engages in Build Everything Together
40	Formal proposals given
20	Deals won

\$2,000,000

Value of deals won

\$4,000,000

Value of Proposals Given

ACTIVITY → Calculate Your Pipeline

Complete the Pipeline Calculator worksheet on Tab 12.1 of the GrowBIG® Toolkit.

ONLY change these variables

1	What is your <i>annual business development goal</i> ?	\$2,000,000
2	Of all client touch points (including those that are purely being helpful and not commercially related), what percentage of them should be proactively creating demand for our reactively discussing commercial opportunities?	10%
3	What percentage of suggested commercial conversations on a new topic <i>actually occur</i> ? Be sure to include conversations both you and your clients instigate.	10%
4	Moving from Listen & Learn to Creating Curiosity In what percentage of these meetings <i>does the client actively engage in building the work together</i> with you?	50%
5	Moving from Creating Curiosity to Build Everything Together What percentage of the time do these conversations <i>result in a formal proposal</i> ?	50%
6	Moving from Build Everything Together to Gain Approval What is the <i>average dollar value</i> of your proposals?	\$100,000
7	Moving from Gain Approval to Retain & Expand What percentage of the time do you win when you've submitted a formal proposal?	50%

To meet your annual sales goal, you will need to have:

16000	Total client touch points needed
1600	Suggested meetings
160	Meeting Occurred
80	Client actively engages in Build Everything Together
40	Formal proposals given
20	Deals won

Account Development Step

\$2,000,000	Value of deals won	\$4,000,000	Value of Proposals Given
-------------	--------------------	-------------	--------------------------

Divide your total touch points needed by 52 to get your needed touchpoints per week.

What is your top insight from this exercise? What do you personally need to do that's in your control to hit your goals?



What's your biggest personal insights about how the MIT process creates achievable, weekly goals from the research of Dr. Edwin Lock?



What's your biggest personal insights about how to pick the right MITs from the research of Dr. Daniel Kahneman, Dr. Amos Tversky, Dr. Teresa Amabile, Dr. Seppo Iso-Ahola and Dr. Charles Dotson?

 **ACTIVITY**

In the space below, review your Opportunity List and Protomoi List then identify three MITs you can commit to completing next week. Remember to start small. Make your first week's MITs so easy so that you'll have no trouble completing them.

Your three MITs should be: Big Impact, written so they are In Your Control, and they should be Growth-Oriented.

Then, go to your calendar and set up a recurring weekly meeting called GrowBIG Weekly MIT Process so that you can add this ritual immediately into your schedule. Fifteen minutes is plenty, but if you fear something might distract you or try to steal away this time, make it thirty minutes to be safe.

MIT 1:

MIT 2:

MIT 3:

Day and time for my ongoing weekly meeting:

 **ACTIVITY → Getting Started Implementing GrowBIG®**

Reflect on where you currently are with business development compared to where you want to be. Consider your 100-point self assessment and all the other elements you've learned in GrowBIG® Training, including the thought starter questions you just read. Write down three things you are excited about implementing this quarter, along with easy tasks to get you started.

What I'm Excited to Implement from GrowBIG® Training	Ridiculously Easy Task to Get Started

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Resources

Locke, Edwin A., et al. "Goal Setting and Task Performance: 1969-1980." *Psychological Bulletin*, vol. 90, no. 1, 1981, pp. 125-152., <https://doi.org/10.1037/0033-2909.90.1.125>

Amabile, Teresa, and Steven Kramer. *The Progress Principle Using Small Wins to Ignite Joy, Engagement, and Creativity at Work*. Harvard Business Review Press, 2011.

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→ Module 12 **BIG**Finish

In Summary...

- You can break down longer-term goals into shorter-term actions to motivate yourself, focusing on what you can control.
- The best way to begin planning for your MITs is to review your Opportunity List and your Protemoi List, especially the right-hand column of next actions.
- ALWAYS focus on your MITs, even when you are busy.
- Remember to start small and scale up. Your initial MITs should be super easy. Set your initial bar so low that you can step over it.
- Rainmakers consistently do a little BD all the time to keep the business development process moving forward.

→ FINAL ACTIVITY

What is the most valuable thing you have learned from this course so far?

Assess Your Progress To Move Forward

Reflect On Your Growth And Take Your Skills To
The Next Level

↓ MODULE OVERVIEW

Note that this module is optional for teams that go through all seventeen GrowBIG® Modules within a short period of time. If it's been a while since you went through Modules One through Twelve, this is the perfect time to take stock of how far you've come. That will let you focus on the right strategies going forward.

↓ OBJECTIVES

At the end of this module, you will be able to:

- ✓ Understand the concept of deliberate practice
- ✓ Have a clear understanding of the progress you've made in several key Business Development areas since completing your initial GrowBIG® Training
- ✓ Identify areas of focus to accelerate your future BD growth





What's your biggest personal insights as you assess your progress in implementing the Grow BIG training? Think back to Dr. K. Ericsson's research from Module 1, "All complex skills are learnable, no one is born with it," what have you learned and applied so far?

A large, empty rectangular area with rounded corners, intended for the user to write their personal insights and reflections on the training.

 **ACTIVITY → Momentum Killers And Bad Habits**

	Progress I've Made In This Area	What I Can Do Next To Improve
Starting meetings talking about myself or our services (show up and throw up)		
Being pushy		
Avoiding talking about money		
Skipping Building Everything Together and "sending a proposal" without incremental buy-in		
Chasing work that isn't a good fit		
Anchoring my BD efforts too much on people I already know		
Winging it in meetings		

ACTIVITY → Assess Your Progress

With that in mind, do a quick assessment of the skills you've tried so far. Keep the following rating system in mind. Once you have assessed yourself, mark the top three skills you'd like to focus on next in the right-hand column.

Skill	Haven't Tried This	Have Made Small Progress	Have Made Meaningful Progress	Top Three Skills To Focus On Next
Core Habits				
Conducting weekly MIT session to choose 3 things that are Big Impact, In My Control and Growth-Oriented				
Investing time on BD activities, including integrating them into my routine even when I'm busy				
Creating A Better Buying Process				
Listening first				
Asking follow-up questions				
Making sure my client affirms "I get it" before I talk deeply about our offerings				
Creating curiosity about our offerings				

Creating cliffhangers in meetings and between meetings				
Getting incremental buy-in with the Build Everything Together model				
Confidently talking about the pricing of our offerings				
Resolving objections by asking questions				
Consistently asking for the advance, especially in live meetings				
Using the HBDI® framework to make my meetings Whole Brained®				
Deepening Relationships				
Focusing on my most important relationships (Protemoi List)				
Following up in helpful ways outside of what I'm paid to do by that client				
Asking others for help in easy and meaningful ways				
Intentionally thinking about moving clients and partners through the Path To Raving Fan				

 **ACTIVITY → Skill Advancements**

Based on your assessment above, what should you focus on next?

→ Module 13 **BIG**Finish

In Summary...

- Eliminate your bad behaviors to create breakthrough results.
- Focus on progress not perfection.
- Know where you're focused next to improve the quickest.

FINAL ACTIVITY

What was a BD experience you led since the initial training that was deeply satisfying?

What did you do *specifically* that you're proud of?

Why did your specific action make you proud?

Develop Targeting Criteria To Focus Your Efforts

Reflect On Your Growth And Take Your Skills To The Next Level

↓ MODULE OVERVIEW

Defining your perfect client is one of the most powerful BD activities you can complete. It helps who you should invest the most in, who you should steer your outbound efforts towards in meeting new people, and which inbound opportunities you should focus on. This module will give you an objective, data-driven way to know where to spend your most precious resource, your time.

↓ OBJECTIVES

At the end of this module, you will be able to:

- ✓ Develop a set of objective criteria for evaluating your current prospects and clients
- ✓ Build a spreadsheet to sort and prioritize and rank your many existing opportunities
- ✓ Define a set of criteria you can use to score and prioritize your future opportunities





Why does knowing your ideal client and having objective targeting criteria valuable for business development?

➔ Example Objective Targeting Criteria

Objective Targeting Criteria: Examples	
Analytical	Experimental
<ul style="list-style-type: none"> • Total revenue • Amount of money spent in your industry • Amount of money spent on organizations like yours • Number of employees • Number of a certain type of employee • Type of industry • Public vs private company 	<ul style="list-style-type: none"> • Innovative or progressive organization • Can integrate easily with our products or services • Growth-oriented organization • Willing to take strategic risk • Broad organization issues align with our expertise • Loves to pilot the kinds of offerings we are great at
Practical	Relational
<ul style="list-style-type: none"> • Have proven expertise in a field • Safety conscious • Have pioneered process efficiencies that we could learn from • Have documented procedures for their business operations • Ease and speed of their buying process • Have a certain type of business process • Have a certain broken or evolved business process • Have documented or undocumented procedures for their business operations 	<ul style="list-style-type: none"> • Will provide references for us • Cultural alignment between us and the prospect • Health of the organization • Reputation of the CEO or leadership team in our industry • Connections the Board of Directors have with our other business targets • Relationship our Strategic Partners have to the organization • Philanthropical nature of the organization

ACTIVITY → Brainstorm Your Potential Targeting Criteria

1) List the potential targeting criteria you could use to prioritize specific clients and prospects. Try to have at least 2 per quadrant. **REMEMBER:** You don't want to include things like ease of entry or strength of current relationship. You'll incorporate things like this later. Focus on things unrelated to your current relationship with these organizations.

Analytical	Experimental
Practical	Relational

2) Evaluate if any of the criteria are yes/no versus things that could be evaluated on a spectrum of a 1 to 5 score. Strike through any truly yes/no criteria. We simply won't include them in our final analysis. For example, if one of your potential criteria is "We only work with organizations that are in the airline, logistics and transportation industries" strike that potential targeting criteria. You'll only include those types of organizations in your analysis, so you won't need those.

 **ACTIVITY → Prioritizing Your Objective Targeting Criteria**

Part 1: List Your Top Criteria

From the brainstorming activity you just completed, list the top three to five criteria that you consider to be the most important or strategic for new business development. These should be based on the level you determine fits based on The Three Domains Of Prioritization we covered.

Part 2: Weight Each Criteria

When you have your list, give each of the criteria a weighting factor to indicate its relative importance to the other criteria. For example, if you sell at the Organizational Level, you might choose: budgets for our types of services 45%, culture 35%, revenue 10%, and location 10%. Or, if you sell at the Buying Center level, you might choose: budgets of our types of services 60%, strategic fit with what we’re good at 25%, speed of buying cycle 15%. Note that the weighting doesn’t have to have exactly 5 elements—in fact, the fewer elements you have, the better. Three is typically ideal.

Just be sure that your weights add up to 100%!

Criteria	Weighting (in percent)
1.	
2.	
3.	
4.	
5.	

ACTIVITY → Prioritizing Your Prospects And Clients

Remember: In this activity, avoid using criteria such as *ease of entry* or *number of people I know at this company*. This exercise is an analytical exercise to tell you where you *should* target, not where it's *easy* to target!

The Target List Prioritization Calculator can be found in the GrowBIG® Toolkit Excel File on sheet 14.2. Use your prioritized targeting criteria to rate your Target List by completing the following steps in the Target List Prioritization Calculator:

1. In Column B, enter at least ten of your top targets for new clients.
2. Replace the *Objective Targeting Criteria* labels in columns C through G with each of your top prioritized objective targeting criteria.
3. For each criteria, enter the weighting in Row 12.
4. Fill out the rankings by column. Choose your 5s and 1s first, then the rest. The very best in a column is a 5 and the very worst is a 1.
5. The average weighted rank is calculated in Column H.

In the space below, write down your key learning from this exercise.

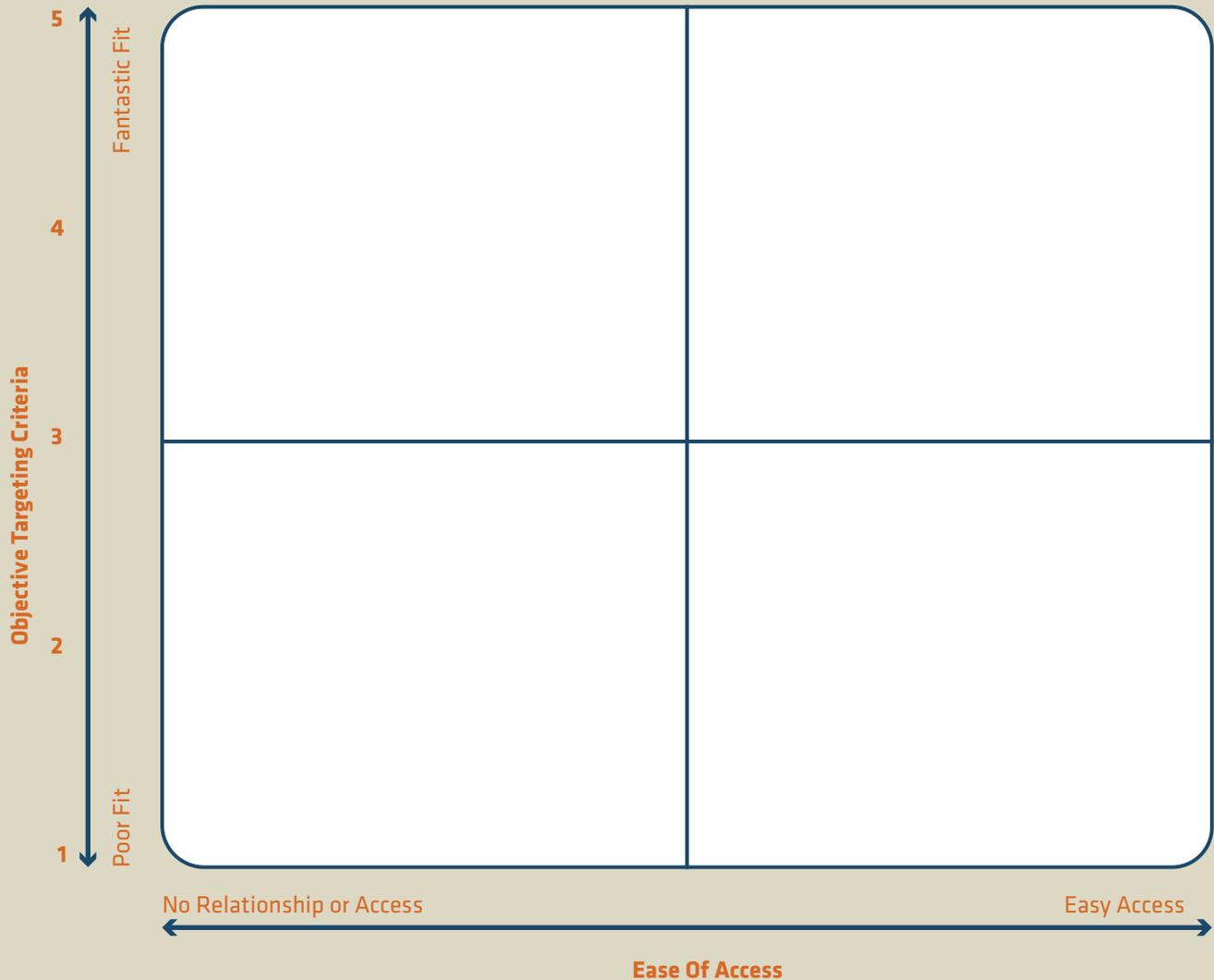
Please to refer to the downloadable 2022 GrowBIG Training Toolkit Modules 1-17.xlsx for additional resources.

➔ Incorporating Ease Of Access And Strength Of Current Relationship



ACTIVITY → Incorporating Ease Of Access Into Your Analysis

Take your Target List from the prior exercise and incorporate how easy it would be to access the organization. Current Raving Fan relationships would be far to the right. No relationship would be far to the left. A strong potential referral might be in the middle. It's OK to make thumb to the wind estimates for your left-to-right ease of access assessment.



What did you learn from this activity?

→ Module 14 **BIG**Finish

In Summary...

- Leverage your Objective Targeting Criteria to steer your future investments.
- Use your Objective Targeting Criteria to evaluate new opportunities that come your way.
- Refine and improve your Objective Targeting Criteria over time as you learn more.

FINAL ACTIVITY

What insights did you have about your Target List after you prioritized them by objective targeting criteria? What will you start, stop, or continue to do based on your prioritized Target List?

What are you most excited about as you complete this module?

Foster New Relationships: Broaden Out And Ladder Up

Meet the right new people in ways they'll want to bend their schedule to meet you, instead of you bending yours to meet them

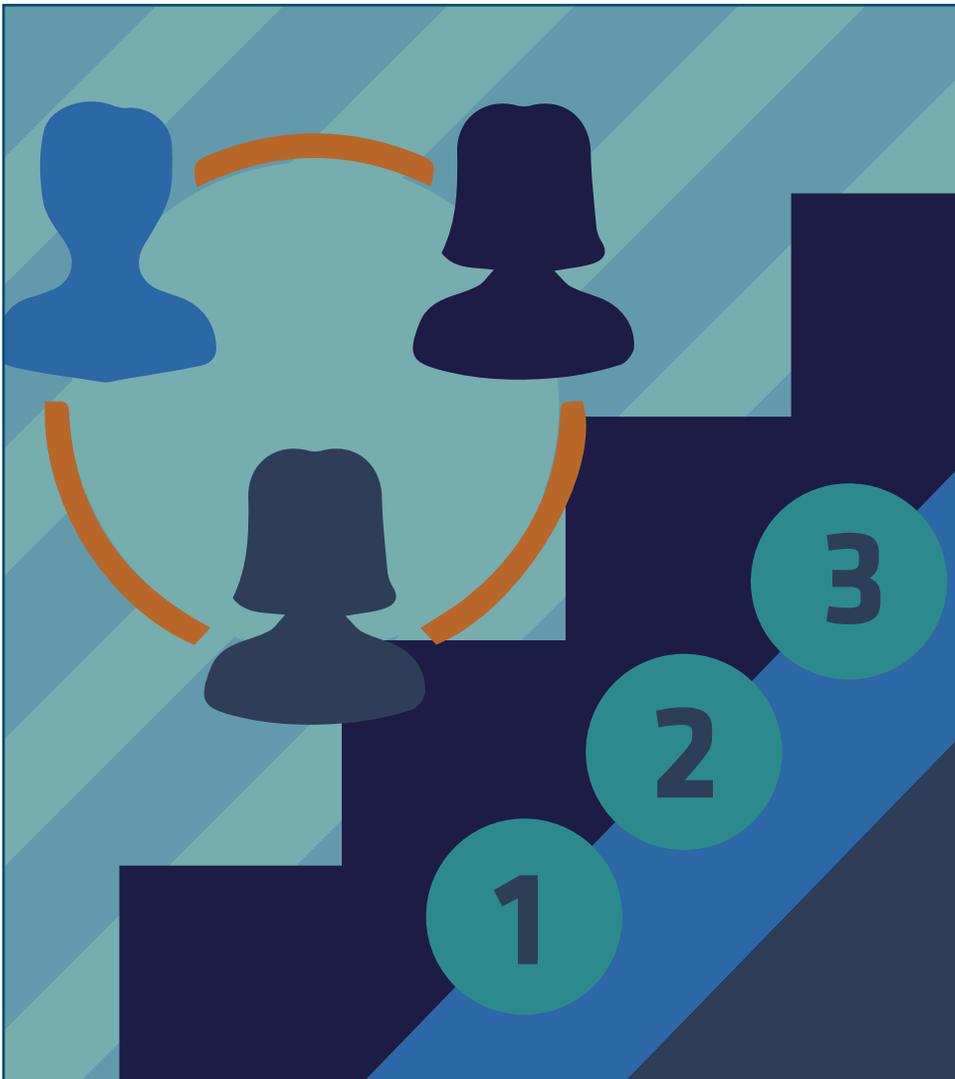
↓ MODULE OVERVIEW

Fostering relationships is paramount to your success. Whether it's deepening relationships with those you barely know or meeting new people, your long-term success will depend on your ability to broaden and elevate your ability to help others. Many people don't understand there's a science to fostering new relationships and mistakenly leave

↓ OBJECTIVES

At the end of this module, you will be able to:

- ✓ List the 16 most effective new relationship strategies
- ✓ Describe a high-level summary of the 16 strategies
- ✓ Select three techniques that you'll use as your cornerstone for your new relationship approach

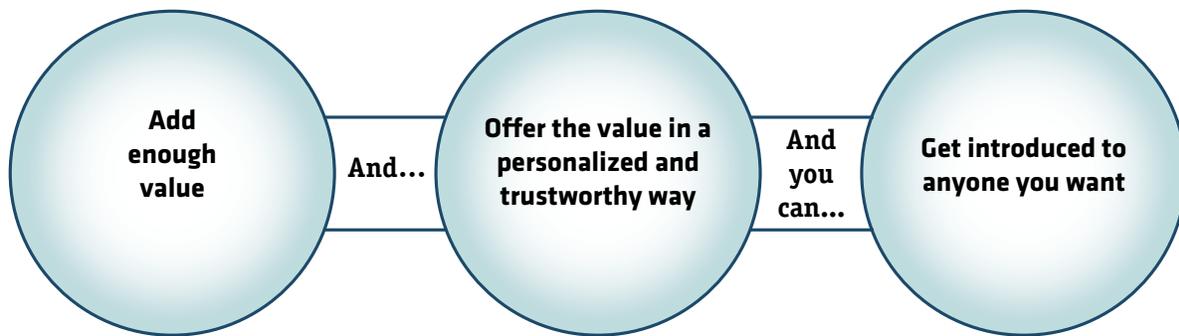




If you are dealing with clients, you need to expand your relationship footprint. Why is this so important to Business Development and how do you do it?

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→ How To Get Introduced To Anyone You Want



➔ GrowBIG® Fostering New Relationships Framework

	Targeted <i>Focused on approaching a specific person</i>	Targeted With Scale <i>Mixture of approaching a specific person, along with scale to others</i>	Scalable <i>Focused on fostering multiple relationships with scale</i>
Warm <i>High flow through rates with warmest personal connection</i>	<ul style="list-style-type: none"> • Turning Friends into Clients 	<ul style="list-style-type: none"> • Value Groups • In-Person Forums • Board of Advisors • Group Memberships 	<ul style="list-style-type: none"> • Speaking
Mixed Warm-Cold <i>Middle-ground flow through rates with medium warmth</i>	<ul style="list-style-type: none"> • Referrals • Ask for Help • Interview Others 	<ul style="list-style-type: none"> • Email Marketing • Strategic Partners 	<ul style="list-style-type: none"> • Social Media • Webinars
Cold <i>Lower flow through rates with the least-warm personal connection</i>	<ul style="list-style-type: none"> • Cold Marketing 	<ul style="list-style-type: none"> • Event Attendance 	<ul style="list-style-type: none"> • Episodic Writing (Including Blogging and Client Alerts)

➔ High-Level Overview Of Each Method

Method		Page Numbers	For more detail look in Execution
Turning Friends Into Clients		10	1
Referrals		10	1
Ask For Help		11	1
Interview Others		11	1
Cold Marketing		12	1
Value Groups		12	2
In-Person Forums		13	2
Board Of Advisors		13	2
Group Memberships		14	2
Email Marketing		14	2
Strategic Partners		15	3
Event Attendance		15	3
Speaking		16	3
Social Media		16	3
Webinars		17	3
Episodic Writing (Including Blogging And Client Alerts)		17	3

ACTIVITY → Implement: Turning Friends Into Clients

Step 1: Using the table below, make a list of friends with whom you have business opportunities.

- Add the name of each friend and the name of their organization.
- Checkmark their strongest thinking preferences.
- Write down the business opportunities that you have with them or their organization.
- Write down Give-to-Get ideas to offer to them.
- What is the next step that you can take for delivering a Cross the Bridge speech to this friend?

Step 2: Using the Crossing The Bridge Conversation framework, craft a well-designed speech that you can use to help your friend understand the work you can do that would benefit them and their organization.

- You will want to craft a message that resonates for all thinking preferences, but that strongly appeals to the thinking preferences of your friend.
- Write down some points in each quadrant that you can include in your speech.
- Use the example on Page 5 of this module to help you craft an effective speech.
- Practice makes perfect. Practice saying the speech until it is natural and easy for you.

 **ACTIVITY** → **Implement: Turning Friends Into Clients**

Name of Friend	Organization	Business Opportunity	Give-to-Gets to Offer	Next Step

ACTIVITY → Implement: Crossing The Bridge Conversation

Key Talking Points

Conceptual Investment	Economic Value	Win/Win & No Expectations	Tangible Next Step

Write Your Crossing The Bridge Introduction

 **ACTIVITY → Implement: Referrals**

Fill out the form below using these directions.

1. Start with the names of your strongest and most-connected Trusted Advisees and Raving Fans. Write their names, and organizations in the first three columns.
2. Next, use LinkedIn or your CRM to research the people they already know. Write down anyone you want to make sure you ask about during the Specific Ask portion of your conversation.
3. Lastly, think intentionally about how you'll frame your conversation with them. Each of these conversations are unique. Write some notes in the last column. Remember, come at this request from a position of strength. You are offering great value and your referral partners want to help you.

Name of Trusted Advisee/Raving Fan	Organization	Their Friends I'd Like to Meet	Framing The Referral

 **ACTIVITY → Implement: Ask For Help**

Use the following to map out your presentation. You can build it after the class is over.

1. **Current State.** In bullet points, write down the key elements of what the marketplace is saying they need and why and how your service/product is important. Try to use a Whole Brain® Walk Around to hit all the thinking styles.
2. **The Playing Field.** Remember this is optional so don't feel like you need to include this. If you do, draw out your version of a Strategy Canvas. Start with the most important qualities of your service product at the bottom and then draw where you excel and where others excel. Be sure to try to connect the qualities along the bottom with what the marketplace is saying on the previous slide.
3. **Your Strategy.** On this slide, you'll be able to clearly define a Whole Brained® strategy to communicate to your audience.
4. **What We Found Doesn't Work.** Here, bullet point out the elements of what you don't do. This helps create clarity about what you focus on.
5. **Our Expertise.** On this slide, document your expertise.
6. **Results.** Here, you'll want to be very Analytical. Document your desired outcomes or past results in metrics and numbers. This might be best communicated in an example chart or with numbers in bullet points. Sometimes showcasing numbers before and after you were involved can be powerful.
7. **Where We Could Use Some Help.** Here's where you'll finish with specific asks to frame the conversation.

 **ACTIVITY → Implement: Ask For Help**

1. Current State	
• •	• •
• •	• •

2. Strategy Canvas						
High						
Medium						
	Write Qualities Of Each Column Here					
Low						

Legend
• Competitor 1
▲ Competitor 2
■ Competitor 3
★ You

 **ACTIVITY** → **Implement: Ask For Help**

3. Your Strategy

We are trying to...	by...
through...	to...

4. What We Found Doesn't Work

Blank area for notes on what didn't work.

 **ACTIVITY → Implement: Ask For Help**

5. Our Expertise

Empty text area for section 5.

6. Results

Empty text area for section 6.

 ACTIVITY → **Implement: Ask For Help**

7. What We Need Next

Where we need help	Benefit to the organization helping

ACTIVITY → Implement: Interview Others

1. Your first step with this strategy is to decide if you are choosing to conduct your interview one time (such as having a senior client leader speak with your team) or if you will do something ongoing (such as a podcast or a show). Which one makes sense for you?
2. Once you decide that, complete the activity below regarding the Target Interviewee, Theme, Technical Nature of Interview, and the Execution Plan.

3. Technical Nature of Interview (Three main speaking points if one time or main topical ideas if ongoing)			2. Theme		
4. Execution Plan			1. Target Interviewee (one person or type of person if ongoing)		
Task	Due Date	Owner			

 **ACTIVITY → Implement: Cold Marketing**

Use the *Cold Marketing Worksheet* for this exercise.

- 1. Target.** First, start by pulling out the target list you developed in the prior module. Write down the top organization from your Target List that you don't think you have a warm entry point/referral into. (You'll want to research this later to validate you don't have a warm pathway to the right person). On the worksheet, fill in the organization's name and the specific individual's name that would be the perfect entry point.
- 2. Research and Approach.** Think about what provocative insight and offer (Give-To-Get) you have to share with them, some kind of connection you can make to create a warmer introduction, a creative way to approach them and lastly write down the execution steps and timing you'd like to follow. This might take awhile and you might want to enlist others to help you think this through. Try to make your insight and your offer unique. For the personal connection, look for school and group affiliations or anything that can create a personal connection. In thinking about your delivery, try to make it creative. How can you make your message stand out and show that your offer is a special one? Lastly, for execution, develop the specific steps you need to be successful.

One final note—you can also use this same approach for more broad-based cold marketing strategies. While we've written the instructions above for a single organization, you might want to use a broader approach to market to your top targets in a specific industry or geography. If this is the case, simply change the titles in step one from Organization to Market and Individual to Role. This will broaden your scope. If you do this, work through Step 2 thinking through the scale you'll need across multiple companies. Think of how you can easily personalize your messages even though you'll be reaching out to a broader audience. This approach can be more difficult, but have a bigger payoff!

ACTIVITY → Implement: Cold Marketing

1. Target	
Organization	Individual

2. Research and Approach			
Provocative Insight		Creative Delivery	
Give-to-Get Offer			
Execution Steps			Personal Connection
Step	Owner	Due Date	

 **ACTIVITY → Implement: Value Groups****Here are your steps to design the perfect Value Group**

- 1. Target Group.** Write down the perfect target group for you. Is it a certain role like a CFO? That role within a certain geography? Try to pick a target group where people would like to network, there would be a strong affiliation and where no one else is bringing this group together. Find a niche that you can own.
- 2. Value.** Define the specific value this Target Group would want. Is it mostly networking? Insights for their role? A mixture? Define the value here so that you can build everything around that. Lastly, test what you've come up with to make sure no one else is providing this to the Target Group.
- 3. Strategic Partners.** What other Strategic Partners would be interested in meeting people in this Target Group, maybe even helping you put it together? Pick partners that can add value in the ways you've listed above. Also, try to pick partners that don't compete with for your services and that would have the ability to bring many of their clients to the events. The partners you choose will send a strong signal about the quality of the group. For example, if you partnered with a law or accounting firm, start with the best brand there is for the particular value you've defined. Don't forget about options in all areas—companies, not-for-profit organizations, and university partners. They can all be great potential fits. Once you have a list of options, it's typically best to stick with three total organizations. You want to have "just enough" to cover most of your target marketplace and provide the necessary perspectives.
- 4. Cornerstone Clients.** Get your marquee clients on board first. Once you know who your Strategic Partners are, you can think through who would be the best Cornerstone Clients across all of your relationships. Start with who in your Target Group would be the most influential to others in the group. Write down three companies that would be great to sign up first. The first thing people will ask you about a Value Group is "Who else is in it?" So, get your best names on board first. Do that, and future recruitment will be a breeze.
- 5. Build a one-pager for the group.** You'll want to build a one-pager to begin to talk to Strategic Partners (first) and then Cornerstone Clients (second). Having something in writing shows you're serious about the group and makes it easy to communicate. To start, just fill out the elements described in the worksheet. You can build a nicer version of the one-pager later.
- 6. Execution Steps.** Lastly, build out the timeframe for the execution steps you need to complete to start the group. We've listed out the typical ones here, and we've given you space to add others. Pull in other experts from your organization to help. Value Groups can provide a tremendous source of leads and access!

 **ACTIVITY → Implement: Value Groups**

Target Group	
Value	
Strategic Partners	Cornerstone Clients

 **ACTIVITY → Implement: Value Groups**

One-Pager for Value Group

Group Name: _____

Value (Why people would join):

-
-
-

Partners

Target Member Profile

Cadence of Meetings

Meeting Location

Sample Topics

 **ACTIVITY → Implement: Value Groups**

Execution Steps		
Steps	Owner	Due Date
Develop branding/visual identity for the group		
Finish one-pager		
Build out list of all specific individuals in Target Group		
Pitch to Strategic Partners with one-pager and Target Group list		
Pitch to Cornerstone Clients		
Pitch to “next level” of clients desired		
Decide on details of initial meeting (topic, speaker, location, etc.)		
Develop collateral to reach out to entire Target Group		
Market to entire Target Group		

 **ACTIVITY → Implement: In-Person Forums**

Here are the steps to design and deliver a fantastic In-Person Forum.

- 1. Target Group.** Write down the perfect target group for you. Is it a certain role like a CFO? Is there an industry that makes sense to focus on? Since these events are in person, a geographic criterion usually makes sense. Try to pick a target group where people would like to network too, since meeting other people will be a secondary benefit to a lot of people. Knowing someone will meet someone else helps get the initial Yes and lowers the chance of cancellations. Find a niche that you can own.
- 2. Value.** Define the specific value that this Target Group would want. What offering do you have that you want to promote? Define the value here so that you can build everything around that. This is important to be very intentional about. Everything will flow from the answers in these first two steps.
- 3. Strategic Partners.** Note this step is optional, but packs a punch if it makes sense to add it. What Strategic Partners would be interested in meeting people in this Target Group? Pick partners that don't compete with the content and that would have the ability to bring many of their clients to the event. The partners you choose will send a strong signal about the quality of the group, so get this right. For example, if you partner with a professional service firm or university, start with the best brand name there is for the particular value you've defined.
- 4. Cornerstone Clients.** It's helpful to get some marquee clients on board first. Once you know who your Strategic Partners are, think through who would be the best Cornerstone Clients across all of your relationships. Start with who in your Target Group would be the most influential to others in the group. Write down three companies that would be great to approach and sign up first. One of the first questions you'll get is "who else is attending?" and getting great Cornerstone Clients will help you generate excitement as you invite others.
- 5. Build a one-pager invite of landing page for the event.** This is what you'll use to promote the event. For this exercise, just plan out what you can. You can build the promotional pieces after this training.
- 6. Execution Steps.** Lastly, build out the timeframe for the execution steps you need to complete to host the In-Person Forum. We've listed out the typical ones here, but you feel free to add anything important to you. Pull in other experts from your organization to help with this later. Make it an organization-wide initiative if you can. In-Person Forums provide a lot of value and should be leveraged as much as possible.

 **ACTIVITY → Implement: In-Person Forums**

Target Group

Blank area for defining the target group.

Value

Blank area for defining the value.

Strategic Partners

Blank area for identifying strategic partners.

Cornerstone Clients

Blank area for identifying cornerstone clients.

 **ACTIVITY → Implement: In-Person Forums**

Content for One-Pager, Invite or Landing Page

In-Person Forum Name: _____

Value (why people will attend):

-
-
-

Partners

Target Member Profile

Date of Event

Meeting Location

Probable Topics

 **ACTIVITY** → **Implement: In-Person Forums**

Execution Steps		
Steps	Owner	Due Date
Develop branding / marketing message for the Forum		
Finish one-pager		
Build out list of all specific individuals in Target Group		
Pitch to Strategic Partners with one-pager and Target Group list		
Pitch to Cornerstone Clients		
Pitch to “next level” of clients desired		
Develop collateral to reach out to entire Target Group		
Market to entire Target Group		

 **ACTIVITY → Implement: Board Of Advisors**

Here are your directions to design a high-powered Board Of Advisors.

1. **Focus and Value Provided.** Start by picking a focus area for the Board Of Advisors. While you might initially think this would be for your entire firm, sometimes it's best to focus on a specific industry, practice area, service/product offering or something else smaller and more focused. Also write down the value you'll give the membership. What thematically would you typically want to cover that would be of extreme interest to the group?
2. **Size.** Write down the right size of a group. Typically 10 to 20 is best. Decide on how many people you'd want at a typical meeting and increase that by 30 to 40% since not everyone will be able to attend every meeting.
3. **Meeting Cadence.** What's the right meeting cadence? People are busy, so you'll want to pick a cadence that leaves people wanting a little more. You want them looking forward to each meeting. Some groups are best done quarterly and others every four or six months.
4. **Cornerstone Clients.** What are the most-important clients to secure involvement? Which client brands would help you in recruitment? Write these names down because you'll want to approach them first.
5. **Execution.** Lastly, write down the various steps you need to execute this strategy to get it started. We've prepopulated the plan in the worksheet with the steps people typically take. Feel free to add additional steps, owners, and due dates.

 **ACTIVITY → Implement: Board Of Advisors**

Size	Focus
	Value Provided
	Cornerstone Clients

 ACTIVITY → **Implement: Board Of Advisors**

Execution Steps		
Step	Owner	Due Date
Design one-pager for the group		
Approach Cornerstone Clients		
Develop list of other desirable clients and prospects		
Pitch to full list of clients and prospects to finalize initial membership		
Plan for and orchestrate first meeting		

 **ACTIVITY → Implement: Group Memberships**

1. **Choose Your Group.** Research all the groups available to you to find the right involvement opportunity. Be sure to evaluate all the options since this will be a big commitment and don't stop once you've found one option. Scour the web and talk to friends, coworkers, and clients. Be sure you find a group with the right VIPs including both industry, function, and level. It sometimes takes work to find the best match.
2. **Determine Your Strategic Value.** Next, determine how you'll add value, and specifically, how you can add value and get an audience to the types of people you'd like to meet.
3. **Make An Offer To Meet The Right People.** With this group and this value in mind, how can you approach the group with an offer that will get you in front of the right people?
4. **Execute Your Plan.** Lastly, create a task list to execute your plan.

 **ACTIVITY → Implement: Group Memberships**

1. Choose Your Group			2. Determine Your Strategic Value
4. Execute Your Plan			3. Make An Offer To Meet The Right People
Step	Owner	Due Date	

An icon of a hand holding a pencil, indicating an activity or task.

ACTIVITY → Implement: Email Marketing

1. Step One

Ideal Subscriber. Write down a description of the perfect subscriber(s) including roles and type of organization they are in.

Technical Content. Write down the kinds of technical things they want to be apprised of along with the technical value add you'll provide that layers on this.

Strategic Approach. Choose what type of email you want to send out.

- Aggregator (link list) of other content with your commentary
- Custom content written by you

Calls to Action. What types of Calls to Action (CTA) might you provide from time to time? Examples can be asks for introductions, Give-to-Get offers, etc.

2. Step Two

Content Calendar. Start building a content calendar of what you'd like to send out to prospects and clients. Mix in value you think they would enjoy and specific content that drives the action you've described in step one.

 **ACTIVITY → Implement: Email Marketing**

2. Technical Content

3. Strategic Approach

4. Calls To Action

1. Ideal Subscriber

 **ACTIVITY → Implement: Email Marketing**

Content Calendar		
Topic	Timing	Next Steps

 **ACTIVITY → Implement: Event Attendance**

You might not need to answer every question below so choose the ones that make the most sense for you. These are the kinds of things we recommend considering. You also might want to develop some kind of tracking mechanism for each conference you attend to keep track of each person you'd like to meet. See the Success Story for ideas. The data you'll want to track will depend on your goals.

1. **Clarity.** Write the names of the people you'd like to meet in the first column. Try to get the attendee list ahead of time, asking the conference coordinators for it even if it's not sent out normally. If you can't, write down the types of people you'd like to meet. You can add exact names after you arrive.
2. **Connect.** While you might think Connect is Relational, in this case it's a very Experimental (think: Strategic) activity. Think about the creative ways you can approach each prospect before the conference even starts. Do you have mutual connections that could suggest you meet at the conference? Can the conference coordinators set something up? Do you have Strategic Partners that can help? Try to connect with the person before the conference so you can suggest a time to secure a meeting while you're both there.
3. **Converse.** When you meet at the conference, what questions would you like to ask your targets? Use the Gravitax model from **GrowBIG® Module 3: Listen and Learn for a Triple Win**. What ways can you connect showing commonality? Think about these answers and write them in the worksheet.
4. **Commit.** Think through a valuable Give-To-Get offer to make. Use the think backwards techniques from **GrowBIG® Module 9: Creating Demand through your Expertise**. Remember to pick something that's relatively easy for you, valuable for the prospect and would likely lead to a next step. Once you have an idea or two for this, think of a date you'd suggest meeting relatively soon. Maybe you'll be in their city soon, there is some annual cycle they would need to meet (like year-end) or there is some other reason to discuss the Give-to-Get by a certain time. Having a reason to act quickly can help, but be authentic with this—if there's no reason to talk soon, skip this suggestion and ask them when they'd like to meet.

 **ACTIVITY → Implement: Event Attendance**

Clarity	Connect	Converse	Commit

 **ACTIVITY → Implement: Speaking**

Here's how to be successful at Speaking.

1. Prioritize Relationships

Start with the kind of person you're trying to meet. Think back to your Target Prospect criteria from **GrowBIG® Module 14: Develop Targeting Criteria To Focus Your Efforts**. What role is the perfect entry point for these types of organizations? Or maybe you already have a list of names. Write down whatever makes sense for you: the type of person you'd like to meet or the actual names of people you'd like to meet.

2. Target Events

Write down the names of the events these people attend. Be sure that the right level of role really attends these events. Many event attendees have a level or two below the person you'd like to meet. Think about industry conferences, topic-oriented events and role-oriented events. Sometimes, it's best to attend an event where the entire reason for the event is built around a type of service you provide (pro: great subject, con: you're with all your competitors) and sometimes it's best to be at a broader event where you're the only person to attend with your expertise (pro: you're unique, con: many people aren't your potential clients). A mixture can also work well.

3. Pick A Valuable Topic

Pick a topic that marries what the perfect audience member cares about and that aligns with your expertise. Pick a topic your targeted people would read in an event description and think "that sounds interesting..."

4. Design Your Call To Action

What Give-to-Get can you offer that aligns with your Valuable Topic? How can you showcase the Give-to-Get prominently and specifically throughout your presentation? How can you professionally and authentically bring it up in your CTA? Your CTA offer should transition you from the one-to-many to one-to-one.

Remember that many times the two-step process used in our Success Story works well—offering a standard follow-up to everyone and then making a more personal and valuable Give-to-Get offer to folks that are perfect relationships to invest in.

 **ACTIVITY → Implement: Speaking**

Prioritize Relationships	Target Events	Pick A Valuable Topic	Design Your Call To Action

 **ACTIVITY → Implement: Social Media****1. Step One**

Strategy. Consider what outcome you're looking for in the long term. Will you be creating a large following, or are you looking to create a smaller "perfect fit" universe of connections? If large, adopt a strategy to connect with everyone. If smaller and more focused, make sure you connect with everyone you've met and have a system for connecting with people you'll meet in the future.

Technical Topics. Write down the kinds of technical things that your audience will want to hear about. What themes in the marketplace do your prospects and clients tend to struggle with? What issues make someone realize they might need your services? Think about this and use the answers to pinpoint topics that will resonate with readers and provide value.

Be sure to include assets you've already created. These are your easiest ways to get started. Write down speeches you have, articles you've written and anything else you can think of.

Support Team. Who will you need to help you be successful? Write down people that have expertise in the areas that match the themes and topics you have identified. Think of people who can dedicate time and be good at generating the kind of content you need.

2. Step Two

Content Calendar. Here's where things get fun. Think back to **GrowBIG® Module 9: Creating Demand through your Expertise.** Define the work you want to do and the Give-to-Get associated with it. Atomize your content in a way that would prompt demand for someone to engage with you, going from the one-to-many on social platforms to a one-to-one virtual or in-person meeting.

Start building a content calendar of what you'd like to post. Keep all or nearly all your posts focused on adding value in ways that will create demand for you and your services.

 **ACTIVITY → Implement: Social Media**

2. Technical Topics		1. Strategy	
4. Content Calendar		3. Support Team	
Content	Pub Date		

An icon of a hand pointing to the right, indicating an activity or action.

ACTIVITY → Implement: Webinars

Here's what you need to succeed with Webinars.

1. Prioritize Relationships

Start with the kind of person you're trying to meet. Think back to your Target Prospect criteria from **GrowBIG® Module 14: Develop Targeting Criteria To Focus Your Efforts**. What role is the perfect entry point for these types of organizations? Or maybe you already have a list of names. Write down whatever makes sense for you—the type of person you'd like to meet or the actual names of people you'd like to meet.

2. Set Goals and Metrics

Start with how many deeper conversations would you like to have. If you're fostering and deepening *existing* relationships, you'll have better flow through rates from the one-to-many webinar to one-to-one conversations. If you're focused on new relationships, this will be lower. Either way, start with the number of one-to-one meetings you'd like to have.

Once you have this, write down how many attendees you think you'll need. This is your one-to-many number.

Now, divide this by .3 or 30%. This is because attendee rates are about 30% of people who sign up. This will give you your final number of participants you'd like to sign up.

Lastly, how many people do you think you and your organization need to *approach* to get that number of people to sign up? There's no common metric to gross up to get your sign up number, so use your best guess. Think of ways to galvanize your organization to approach this number of people.

3. Choose a Valuable Topic

Pick a topic that marries what the perfect audience member cares about and that aligns with your expertise. Pick a topic your targeted people would read in an event description and think "that sounds interesting..."

4. Design your CTA

What Give-to-Get can you offer that aligns with your Valuable Topic? How can you showcase the Give-to-Get prominently and specifically throughout your presentation? How can you professionally and authentically bring it up in your CTA? Your CTA offer should transition you from the one-to-many to one-to-one.

Remember: Many times the two-step process used in our Speaking Success Story works well: offering a standard follow up to everyone and then making a more personal and valuable offer to folks that are perfect relationships to invest in.

 **ACTIVITY → Implement: Webinars**

2. Set Goals and Metrics			3. Choose a Valuable Topic
Target Number of One-to-one Conversations	Target Number of Sign Ups	Target Number of People to Approach	
4. Design your CTA			1. Prioritize Relationships

ACTIVITY → Implement: Episodic Writing (Including Blogging and Client Alerts)

1. Topic

Start with the work you'd like to do. Then think through the Give-to-Get you can provide that leads to that work. With this in mind, what topic would prompt demand for your Give-to-Get? Be sure to pick something interesting and compelling.

2. Target Audience

With this in mind, who's the perfect target audience for your work, Give-to-Get and topic? Be specific like the example provided. Great writing writes with one person in mind.

3. Target Platform

Now, what's the best platform for you to publish this article? Anything can work. Examples are your organization's website (client alert or blog) to someone else's blog or periodical. Focus on prestige of the platform. This is because you and your colleagues will do the follow-up, sending your article around with an offer of a Give-to-Get. Many people focus on the size of the publishing platform, but few new relationships come from someone reading your article and reaching out. The traction will come from your own outreach and follow-up. So, for placement, focus more on prestige than scale.

4. Execute

Lastly, think through your execution. Writing the piece is important, but go further. Before you write, map out who you'd like to get introduced to (using the published piece for credibility) and who will make that introduction. Do this first, *then* work on your plan to write the piece. You want to incorporate everyone needed into your plan long before you start writing the article, well in advance of publication.

ACTIVITY → Implement: Episodic Writing (Including Blogging and Client Alerts)

1. Topic			3. Target Platform
4. Execute			2. Target Audience
Step	Owner	Due Date	

 **ACTIVITY → Define Your New Relationship Strategy**

Use the Fostering New Relationships Sheet 15.1 in the GrowBIG® Toolkit 2 Excel Spreadsheet to choose which methods you will focus on this year.

1. Enter the number of hours you have available to spend on new relationships.
2. Pick your top three methods.
3. Allocate a percentage of time to each of them.
4. Check to make sure that your percentages total to 100% (See Cell I4 to check).
5. Go to the Sections in Module 15 Execution workbooks that match the letter of your chosen techniques to read more.

Please refer to the downloadable 2022 GrowBIG Training Toolkit Modules 1-17.xlsx for additional resources.



Module 15 **BIG**Finish

In Summary...

- You're the front line—it's up to you to create and foster the right new relationships.
- You can meet anyone if you offer enough value and pair it with a warm, personalized introduction.
- The methods in this module all work. You'll want to choose what makes sense for you given your unique situation.
- Your business development hours are precious. When it comes to new relationships, don't simply "do what you did last year but a little better" or anchor on what worked for others. You're unique. Choose the methods that work for you and follow the advice in the upcoming execution-oriented modules.
- Track your progress and effort over time. Determine which methods work best and shift your energies to those. When it comes time to build next year's plan, you'll have real data to evaluate the alternatives.
- Lastly, have fun. Fostering new relationships is hard. The flip side of that is that it's one of the most enjoyable BD activities when you make progress! As you try, test and tweak, you'll build momentum. This gets easier over time. Success creates more success!



→ FINAL ACTIVITY

Review the three methods you chose. Which is the most important for you? Why?

Gaining Traction With Early Stage Relationships

How To Design Your Short-Term Actions To Have The Highest Chance Of Long-Term Success With Fragile, New Relationships

↓ MODULE OVERVIEW

Early-stage relationships require a unique approach. You need to put forth intentional effort with both quality and quantity of meaningful interactions. Strong long-term relationships are created with successful early interactions. This module will show you how to create traction and gain momentum in the first few weeks of your relationship

↓ OBJECTIVES

At the end of this module, you will be able to:

- ✓ Understand key strategies and approaches to gain momentum and develop traction with early-stage relationships
- ✓ Develop a campaign of helpfulness to execute for an existing, important relationship





What's your biggest personal insights from the two GrowBIG Laws of Early- Stage Relationships?

A large, empty rectangular box with rounded corners, intended for the user to write their personal insights.



What's your biggest personal insights of the Five Sciences of Early-Stage Relationships from the research of Dr. Hanan Shteingart, Dr. Soloman Asch, Dr. Robert Bornstein, Dr. Xiang Fang, Dr. Ohtsubo Yohsuke, Dr. Alice H. Eagly, and Dr. John Gottman?

ACTIVITY → Decode The Anatomy Of An Early-Stage Client Interaction

Below is an exchange between a business development professional named Paula and a prospect of hers named Peter. They met at business function where Paula used the Event Attendance method in the prior module. Peter was the number one person she wanted to meet, and she made it happen! She connected with Peter and offered a follow-up, which he was excited about. She was able to learn a few things about Peter too, which you'll notice in her initial follow-up.

As you read through the exchange, circle everything in Paula's communications that are attempts to connect or find commonality, as well as any successful connections she makes.

Identify each as either being hireable or humanistic outreaches. Tally the number of each in the grid below.

Attempts And Successful Connections		
	Hirable	Humanistic
Attempts To Connect Or Find Commonality		
Successful Connections		

March 1	E-mail exchange	<p>Date: March 1 8:30 AM From: Paula Professional To: Peter Prospect Subject: Follow-up</p> <p>Peter,</p> <p>It was so nice to meet you at the Leadership Forum. I enjoyed learning a little bit about your business and some of the challenges you and your team are facing.</p> <p>Like we talked, I will be in your area next week, and would be happy to show you the approach we've found works to scale a growth mindset and approach across an organization. It sounds like measurement interests you and I'm happy to share how we've had success at other clients.</p> <p>Are you by chance free Tuesday March 9 at either 9:30 or 2:00? If not, I can try to flex into other times.</p> <p>Looking forward to more great conversation.</p> <p>Regards,</p> <p>Paula</p> <p>Ps. How did the soccer tournament go with your daughter?</p>
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<p>March 1</p>	<p>E-mail exchange</p>	<p>Date: March 1 12:09 PM From: Peter Prospect To: Paula Professional Subject: Re: Follow-up</p> <p>Paula,</p> <p>Very nice to hear from you. I appreciate your prompt follow-up, as I too enjoyed our conversation, and was intrigued by some of the things you shared regarding how you have helped other clients in situations like mine.</p> <p>Next Tuesday at 2:30 works well for me, so let's plan to meet then. I look forward to it.</p> <p>The soccer tournament was great!!! Sally scored a goal and their team won the tournament. We're still on a high at home.</p> <p>Peter</p>
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<p>March 1</p>	<p>E-mail exchange</p>	<p>Date: March 1 5:03 PM From: Paula Professional To: Peter Prospect Subject: Re: Follow-up</p> <p>Hi Peter,</p> <p>That time sounds great! I'll shoot an invite over in a moment.</p> <p>Here's something you might like. We recorded a short video with a client on how they scaled a growth mindset across their organization. It's about 10 minutes and packed with information. You might even know their CMO, Sally Jones. (Happy to introduce you if you don't know her yet.)</p> <p>If you don't have much time, skip right to the 7:52 mark. That's where Sally talks about how they measured and gamified having the team make Give-to-Get offers across one of their teams. The results were fantastic—they increased new projects 253% in six months. Happy to share our process next week.</p> <p>Speaking of games, congrats on the tournament win! Can't wait to hear more.</p> <p>Paula</p>
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March 8	E-mail exchange	<p>Date: March 8 11:45 AM From: Paula Professional To: Peter Prospect Subject: Confirming Our Meeting Tomorrow</p> <p>Peter,</p> <p>I hope you enjoyed your weekend. I'll see you tomorrow at your offices at 2:30. Looking forward to speaking with you and finding ways to be helpful.</p> <p>See you tomorrow.</p> <p>Paula</p> <p>P.S. P.S. I just saw your post on LinkedIn about the Alzheimer's foundation you are chairing. Having lost my grandmother to Alzheimer's, it's a cause that's near and dear to my heart.</p>
March 8	E-mail exchange	<p>Date: March 8 11:45 AM From: Peter Prospect To: Paula Professional Subject: Re: Confirming Our Meeting Tomorrow</p> <p>Looking forward to meeting.</p> <p>That video you sent was intriguing. I know Sally, but not really well.</p> <p>Let's talk about an intro to her tmrw.</p>

March 9

Meeting Notes

The meeting with Peter and Paula occurred as planned. It went for about an hour. Here are Paula’s notes in a Whole Brained® Walk Around format.

Analytical	Experimental
<p>35-year-old professional service firm, 1,650 total employees</p> <p>26 BD professionals (10 new logo AEs, 16 account managers); 4 managers (sales directors)</p> <p>Most BD done by the professionals themselves</p> <p>Presence in all 50 states, about 12 other countries.</p> <p>Growth has flat for past 2 years (concerned)</p> <p>He appreciated my pushback that BD was a learnable skill. He had always thought of it as “you’re born with it or not” before this meeting. Saw him very interested in the Ericsson research</p> <p>Peter really likes new ideas, metrics and numbers. 1221 HBDI profile?</p>	<p>No real budget for training as it’s never been a priority</p> <p>Incredible brand is known for high-quality, and is usually not the lowest priced option. Peter says they grew historically despite not having any kind of process or skill development</p> <p>The vast majority of their experts completely avoid BD activities, lack confidence</p> <p>5-year strategy includes intense focus on expanding within existing accounts</p>
Practical	Relational
<p>Have done some “home grown” training in house but no consistent BD processes are followed. Peter says it isn’t great—just a few PowerPoint slides</p> <p>Use Salesforce as CRM</p> <p>Mentioned HBDI and applicability to her team; she’s familiar but never took the assessment</p> <p>Offered a Give-to-Get to do HBDI with a senior team, focusing on making their high-stakes pitches more Whole Brained®</p> <p>Peter would like an intro to Sally from the video case study</p>	<p>Entrepreneurial culture, little accountability</p> <p>Peter has been there for 6 years and reports to COO (Tom) who is lukewarm on investing in outside training firms. Peter would love new ideas about how to grow.</p> <p>Peter:</p> <ul style="list-style-type: none"> • Loves soccer and helps coach his daughter’s team • Is a big St. Louis Cardinals baseball fan • Got into cricket while living in Australia • Likes triathlons • Enjoys adventure travel

<p>March 10</p>	<p>E-mail exchange</p>	<p>Date: March 10 10:36 AM From: Paula Professional To: Peter Prospect Subject: Meeting Recap</p> <p>Peter,</p> <p>Thank you for your time yesterday. What a great meeting.</p> <p>Couple follow-ups</p> <ul style="list-style-type: none"> • I'll check in Monday like we discussed • I already checked in with Sally. She's happy to meet you and will give you a call • Here's the link for that TED Talk video on behavior change we talked about • I've already pinged my friend that took the bicycling trip in Africa. She loved it! I'll circle back when I learn more. <p>I also loved finding out that you had the good sense to marry a fellow Nittany Lion!</p> <p>Have a great day.</p> <p>Paula</p>
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<p>March 11</p>	<p>E-mail exchange</p>	<p>Date: March 11 5:16 PM From: Peter Prospect To: Paula Professional Subject: Re: Meeting Recap</p> <p>Paula,</p> <p>I just had a chance to view the TED Talk, and I did love it. Thanks for sharing. I am passing it on to several colleagues. That's what we need to do and I like how it aligns with your program.</p> <p>Have a great night and we will connect early next week.</p> <p>Peter</p> <p>P.S. You are lucky I am not holding your PSU alumni status against you! I guess Becky has worn me down over the years.</p>
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March 12	E-mail exchange	<p>Date: March 10 10:36 AM From: Paula Professional To: Peter Prospect Subject: Africa Trip Details</p> <p>Peter,</p> <p>I heard back from my friend Jamie. Here are the details from that Africa bicycling trip. Her exact words: “nothing else like it—life changing for our family.”</p> <p>Seems like this might be a good fit for what you were looking for.</p> <p>LINK</p> <p>Happy to connect you with her if you’d like!</p> <p>Paula</p>
March 14	Amazon package arrives	<p>Dr. Anders Ericsson’s book Peak arrived at Peter’s office. Paula had ordered it the night of their meeting on March 9.</p>
March 14	E-mail exchange	<p>Date: March 14 1:12 PM From: Peter Prospect To: Paula Professional Subject: Re: Africa Trip Details</p> <p>Paula,</p> <p>Loved this link about the trip. I’m going to talk with the family about it tonight. We need to get away from our phones for a week and this could do it.</p> <p>Also, I spoke with Sally yesterday. My thoughts are coming together. Let’s definitely do that HBDI session we’ve been talking about.</p> <p>Can you give me a call tomorrow? I’m pretty free in the afternoon.</p> <p>Peter</p> <p>Ps. I got the Ericsson book Peak today. I enjoy research like this. Looks super interesting. Thank you!!</p>

<p>March 15</p>	<p>Phone conversation</p>	<p>Summary of Paula’s notes from phone conversation with Peter:</p> <ul style="list-style-type: none"> • Tom recognizes BD efforts need to be ramped up to start seeing top line growth and be poised to achieve 5-year strategy. He’s also worried about their flat growth • He’s leery of bringing in “sales training” companies because he’s had several bad experiences at prior organizations. • Since money isn’t in the budget, they will need to find it somewhere else • Tom didn’t shut this down, but he wants to “see it in action” and not rush into anything • This fit well with the HBDI session idea. Peter is set up a planning Zoom call to get other folks on board and do planning • Peter invited us to the Alzheimer’s gala. Exciting!
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<p>March 16</p>	<p>E-mail exchange</p>	<p>Date: March 18, 8:22 AM From: Paula Professional To: Peter Prospect Subject: Gala</p> <p>Peter,</p> <p>I checked schedules and we’re in for the gala!</p> <p>Philippe and I are really excited.</p> <p>Let us know what we should do next.</p> <p>Paula</p>
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<p>March 16</p>	<p>E-mail exchange</p>	<p>Date: March 18, 4:45 PM From: Peter Prospect To: Paula Professional Subject: Re: Gala</p> <p>Paula,</p> <p>So thrilled you and Philippe can attend the gala! I will make sure you are sent a pair of tickets. I’ve got your address from your email footer. This is going to work great as I can introduce you to Susan too.</p> <p>Peter</p>
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March 18	E-mail exchange	<p>Date: March 18, 6:30 PM From: Andy Professional To: Peter Prospect Subject: Re: Gala</p> <p>Peter,</p> <p>We will be on the lookout for our tickets. Really looking forward to it.</p> <p>Good news: I just found out my friend who took her family on that Africa trip is going to be at the Gala too. We'll have to orchestrate a quick chat at the bar!</p> <p>Paula</p>
March 23	Zoom meeting	<p>Attendees: Peter and four other people that help with growth activities</p> <p>Paula's meeting notes from Zoom meeting:</p> <ul style="list-style-type: none"> • Gave team more information on HBDI and its comprehensive application to business • Did a whiteboard Whole Brain® Walk Around to show how our program could impact their organization from a strategic, results, process, and cultural perspective • Peter guessed that Tom is probably green and blue dominant, followed by yellow, with red most likely being his least. • Peter didn't think we needed to include the CFO at this point and was hesitant to do so, but I shared that in my experience, the earlier you can get the buy-in of all key stakeholders, the better. He appreciated the pushback and agreed to include her • Planned logistics for the session, scheduled for 4/8. Sixteen people will attend including Tom, CFO (Kathryn) and everyone we'd like to meet
March 24	E-mail exchange	<p>Date: March 24 8:45 AM From: Paula Professional To: Peter Prospect Cc: Andrew Account Manager, Tiffani Trainer Subject Line: HBDI Assessment</p> <p>Peter,</p> <p>Great Zoom call yesterday. We got an hour of work done in 33 minutes.</p> <p>I've copied Andrew who will send over the link and directions for the team to complete the HBDI assessment. He can work with Tiffani on your side like we planned. We'll keep everything moving forward while you're out SCUBA diving in Grand Cayman.</p> <p>I'll look forward to speaking to you when you return. We can make the final decisions for the 4/8 agenda on our call with Tom and Kathryn on 4/6.</p> <p>Safe travels!</p> <p>Paula</p>

April 6	E-mail exchange	<p>Date: April 6, 12:14 PM From: Peter Prospect To: Andy Professional Subject: We're back</p> <p>Paula,</p> <p>I got your voicemail message late yesterday afternoon. Our vacation was everything we'd hoped it would be and re-entry has certainly been difficult!</p> <p>I am confirming our Zoom this afternoon at 3:30 for a 15-minute conversation for final review with Tom and Kathryn. I'll look forward to talking then.</p> <p>Peter</p>
April 8	Paula's Meeting Notes	<p>The HBDI session went extremely well. Give-to-Gets work!</p> <p>Tom and all involved were excited to learn how they can revamp client interactions, especially their proposal process.</p> <p>Main themes at the end:</p> <ul style="list-style-type: none"> • This is different than anything we've done before. • Our people can learn BD skills when taught like this. • We need more of this program.
April 8	E-mail exchange	<p>Date: April 9, 4:32 PM From: Paula Professional To: Peter Prospect Subject: Next Steps</p> <p>Peter,</p> <p>Thanks again for all your help and support in making today's session so successful.</p> <p>It was so great to see people's excitement build. I'm even more excited that Tom asked for a proposal for a pilot session with all your BD professionals.</p> <p>I know we all had to run at the end. What's the best way to get that going?</p> <p>Also, as promised, here's the contact information for the tutor we used for both our kids for college test prep. She really worked wonders and I am certain she can do the same for your kids.</p> <p>Talk to you soon.</p> <p>Paula</p>

April 9	E-mail exchange	<p>Date: April 9, 4:38 PM From: Peter Prospect To: Paula Professional Cc: Alex Assistant Subject: Re: Next Steps</p> <p>Paula, You beat me to the punch!</p> <p>That was the best externally led session we've ever gone through as a team. We're getting more value from you than many of the vendor partners we pay big bucks to. So excited to move forward. Our folks are going to love the pilot.</p> <p>I am also excited to work with you too. Feels like we've known each other for years!</p> <p>Let's have a Zoom call to talk next steps. I want to pull in James, our CHRO. My assistant is copied to find a time. Let's get something on the books this week. I'll cover how we can expedite the SOW too.</p> <p>Also, thanks for your tutor's contact information. Reaching out to her next.</p> <p>Thanks again. What a great day.</p> <p>Peter</p>
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After finalizing your tally marks, rate Paula's performance using the checklist we reviewed earlier. Five is high, one is low.

	1	2	3	4	5
How well did Paula listen for and take notes on every way she could be helpful?					
How well did Paula choose the most powerful follow up interaction (In person > video call > phone call > email or other digital writing)?					
How well did Paula create her interactions in the shortest way possible?					
How well did Paula overdeliver on her promises?					
How well did Paula balance her positive to constructive interactions?					
How well did Paula recognize and jump on any Moments of Truth that occurred?					
How well did Paula leverage Assets and offer Give-to-Gets throughout the process?					

Overall, how did Paula do?

What can you personally take away from reading this exchange?

 **ACTIVITY → Brainstorm Investments**

Select two out of the four scenarios below. Work in pairs to brainstorm at least 2 items in each category that you could offer as an investment based on the following situations. Assume the person is a perfect prospect for you, so consider both hireable and humanistic follow-ups too.

1. Your client is planning to consolidate twelve internal geographic reporting regions across their largest country down to three. Your contact is a foodie and you recently ran into her at a local food and wine festival. She's concerned about the impact of larger regions on their engagement and retention as things will feel much less "local" and personalized internally. What investments might you offer her?

2. Your client has informed you that he is taking early retirement, which is about five years earlier than planned. He's chosen his successor. She's ready, coming from another functional area. That said, he's worried about the transition, especially the team losing focus on executing their strategic plan, which they have all just finished and invested a tremendous amount of time developing together. He has also shared with you that his successor just came back from a sabbatical during which she took a six-month cruise around the world. You have a larger percentage of your work flowing through this group, so this is important. You need your current client to feel well served while you add value to the new incoming client leader. What investments might you offer both?

3. You just met with your client who is about to head off to Munich for Oktoberfest for a week. He shared that he is downsizing and needs to lay off 1,500 workers within the next two months. He is very concerned about employee morale and the impact on productivity. This person is a big prospect of yours, but you haven't been hired yet. What investments might you offer him?

4. A large client of yours is the proud owner of a German Shepard rescue puppy like you are, and is just starting formal training for the dog. In catching up about this, she shared more detail about a publicly known transaction—that they are acquiring a large entity with the deal likely closing next week. That part is publicly known, but this is new: she's been chosen to run the integration process. She confided to you that while she is incredibly excited about this opportunity, she is concerned about their internal processes as this is a much larger acquisition than they've done before. Her career is on the line. What investments might you offer her?

 **ACTIVITY → Planning Your Early-Stage Interactions**

Think of a prospect you have met recently or someone with whom you have a relationship that you would like to rekindle. Write their name on the top line below. Next, plan out the investments you will make in this person over the next several weeks. Reaching out every 2-3 days would be ideal.

Name: _____

Map out your campaign of helpfulness below:

Day 1: _____

Day 2: _____

Day 3: _____

Day 4: _____

Day 5: _____

Day 6: _____

Day 7: _____

Day 8: _____

Day 9: _____

Day 10: _____

Day 11: _____

Day 12: _____

Day 13: _____

Day 14: _____

Day 15: _____

Day 16: _____

Day 17: _____

Day 18: _____

Day 19: _____

Day 20: _____

Day 21: _____

Day 22: _____

Day 23: _____

Day 24: _____

Day 25: _____

Day 26: _____

Day 27: _____

Day 28: _____

Day 29: _____

Day 30: _____

Day 31: _____

A blue arrow pointing to the right, positioned to the left of the word 'Resources'.

Resources

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→ Module 16 **BIG**Finish

In Summary...

- Plan out your interactions for early-stage relationships. They need a unique approach and require a concentrated initial effort to gain positive momentum. Focus on both the quality and quantity of interactions.
- Design the initial few weeks of client interactions in the way you want to be known for over years to come.
- Show you care. It's more important than the benefits people get from you. Show you care in both hireable and humanistic ways.
- Be positive with your interactions, but not always. Only sharing good news is a sign that you aren't willing to share the truth, or what's being overlooked. A 5:1 positive to negative ratio works great.
- Jump on Moments of Truth, when another person asks for your help and it has nothing to do with you being commercially successful.
- Be intentional with your follow-ups by designing a Campaign of Helpfulness during those first few weeks of your relationship.

FINAL ACTIVITY

1. What is your #1 insight from this module?

2. What is your #1 takeaway you will implement?

Grow Your Book Of Business, Your Relationships And Your Career

Build Your Personal Strategy And Execution Plan To Gain Control And Live The Life You Want New Relationships

↓ MODULE OVERVIEW

This module will build on everything you've done in GrowBIG®. It will give you a strategic planning methodology to pull everything together and prioritize your actions. Then, it will give you a template to build your personal BD Habits to enable long-term success.

↓ OBJECTIVES

At the end of this module, you will be able to:

- ✓ Describe the four components that drive long-term success
- ✓ Build a strategic plan for your portfolio of business
- ✓ Identify the enabling habits you have now
- ✓ Design a habit-based system to keep you on track

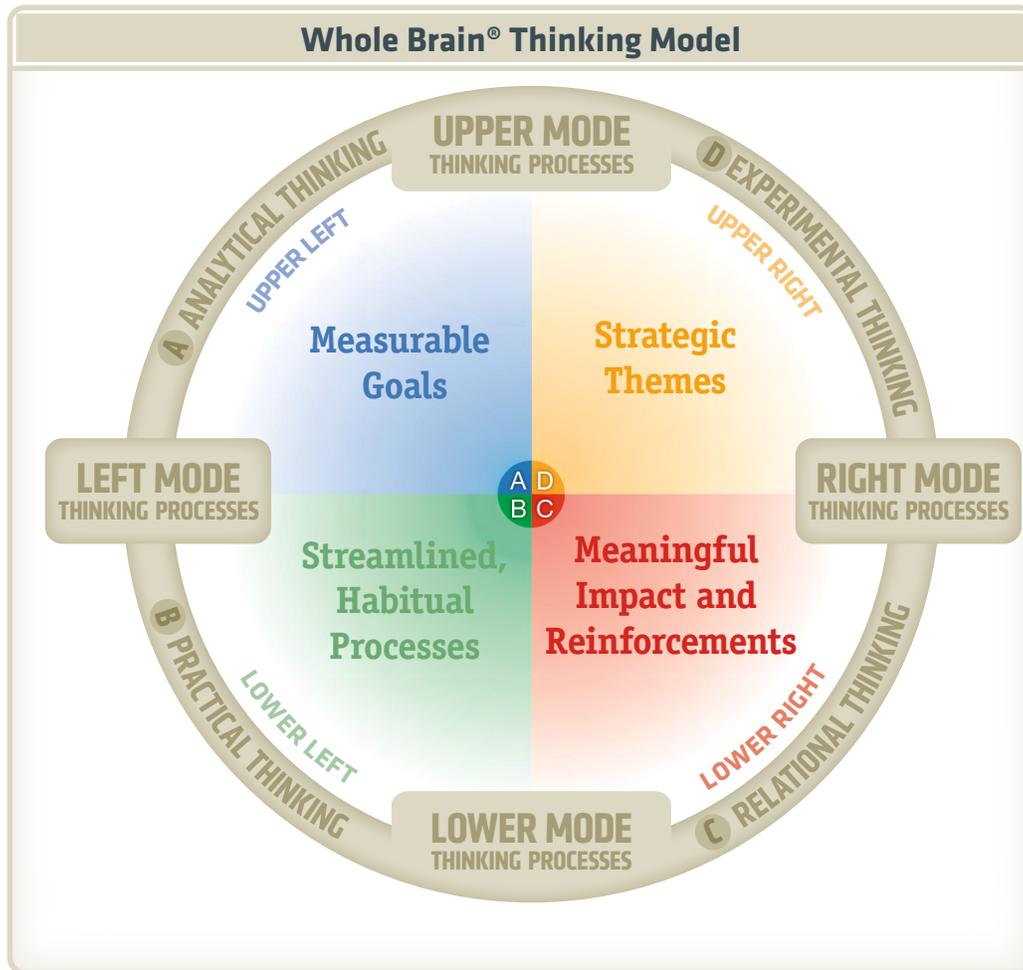




What's your biggest personal insights about enhancing your rainmaking skills from the research of Dr. Mihaly Csikszentmihalyi, Dr. Tracy Cheung, Dr. Teresa Amabile, Dr. Sonja Lyubomirsky, Dr. Roy Baumeister, and Dr. Daniel Kahneman?

A large, empty rectangular box with rounded corners, intended for the user to write their personal insights.

→ The Components Of A Great Personal Strategic Plan





What's your biggest personal insights about goal setting from the research of Dr. Edwin Locke?

A large, empty rectangular area with rounded corners, intended for writing a response to the question above.

ACTIVITY → Assess Your Beginning State

Note: If you recently took the Current State Self-Assessment, then review it. If it's been a while, do it again.

The best place start is with a self-assessment. Think about this self-assessment like scores for artistic events in the Olympics similar to platform diving or gymnastics floor routines. They're not perfect, but they give a numerical score for an abstract skill. The specific breakdown in this activity will give you insights for where you are now and what you should focus on next.

Fill out the following profile using these definitions (double the scale for Efficiency):

- 1 – I could use a few pointers here.
- 2 – I'm doing OK on this.
- 3 – Ah! One of my strengths.
- 4 – I am exceptionally good at this.
- 5 – I am an expert. I have nothing left to learn about this.

Measurement		Vision	
Question	Score	Question	Score
How much money did I bring in during the last year compared with how much I would have liked to? [Score 1 to 5]		Have I defined the areas where my ideal clients will be spending money in the future? [Score 1 to 5]	
How much time did I dedicate to BD in the last year compared with how much I would have liked to? [Score 1 to 5]		Do I have a clear brand I promote in the marketplace that is aligned with these areas? [Score 1 to 5]	
Do I have an ongoing process for measuring and reinforcing my personal success? [Score 1 to 5]		Do I have a clear BD strategy for each step in the process, from generating leads to closing deals, and do I follow it consistently? [Score 1 to 5]	
Do I have an ongoing process for measuring and reinforcing my team's success or, if solo, my success with my outside collaborators and strategic partners? [Score 1 to 5]		Do I have a vision for integrating current clients, strategic partners, and colleagues with my overall business strategy? [Score 1 to 5]	
Total Measurement Score (Max = 20)		Total Vision Score (Max = 20)	
Efficiency		Relationship	
Question	Score	Question	Score
Do I have an ongoing series of meetings to measure and track my success? These "meetings" can be just with yourself, with an accountability partner, or with your team. The key is that you allot time to managing your pipeline just as you do for managing any important project. [Score 1 to 10]		Have I identified—and written down—the key characteristics of my ideal clients? [Score 1 to 5]	
Do I have an easy-to-use system to measure and track my success? [Score 1 to 10]		Have I used these key characteristics of my ideal clients to identify and write down the organizations I'd like to get introduced to? [Score 1 to 5]	
Do I hold myself accountable for my commitments? [Score 1 to 10]		Do I have a method for investing in and being helpful to the most important people who will help me grow (clients, strategic partners, influencers)? [Score 1 to 5]	
Do I celebrate my incremental successes (not just the end goal of closing business deals but also the progress toward that end) personally and with my colleagues? [Score 1 to 10]		Do I have an appropriate number of touch points to stay top of mind with these most important people, and do I track my touch points? [Score 1 to 5]	
Total Efficiency Score (Max = 40)		Total Relationship Score (Max = 20)	
Total Score (Measurement + Vision + Efficiency + Relationship)			

What were your top learnings from this exercise?

 **ACTIVITY → Calculate Your GrowBIG® Index**

Divide the total number of dollars of new business you added last year by the number of hours you spent on BD. This is your Grow BIG index, which represents the amount of new business revenue you brought in for every hour of BD you put in.

1. Dollars of new business you've added in the last year = _____
2. Estimated number of hours spent on BD in the last year = _____
3. GrowBIG® Index (Line 1 ÷ Line 2) = _____

This amount tells you a lot about your efficiency at BD. What insight does this calculation provide you? What should you do with this insight?

ACTIVITY → Define Your Future State

Measurement		Vision	
Target BD Dollars for the next year		Describe how my perfect prospects will be spending money in the next year.	
Target BD Hours for the next year			
Target GrowBIG® Index (Dollars/Hours)			
Describe how I will measure my success in the coming year.		Describe what brand I will want to be known for in a year.	
Efficiency		Relationship	
Describe what BD Habits I want to do within the next year consistently and habitually.		Describe my perfect prospect, including the specific entry point role, for the future.	
Describe how I will hold myself accountable and celebrate my successes.		Describe my network of Protemoi and what I want it to look like a year from now. Consider describing specifics like number of raving fan relationships, where you want current Protemoi to be on the path to Raving Fan, how many new Protemoi you will add, how many people you will be touching with your BD system a year from now, or other relationship aspects you think are important.	

 **ACTIVITY → Craft Your Strategic Themes**

Use the space below to write your three Strategic Themes

Theme 1

Theme 2

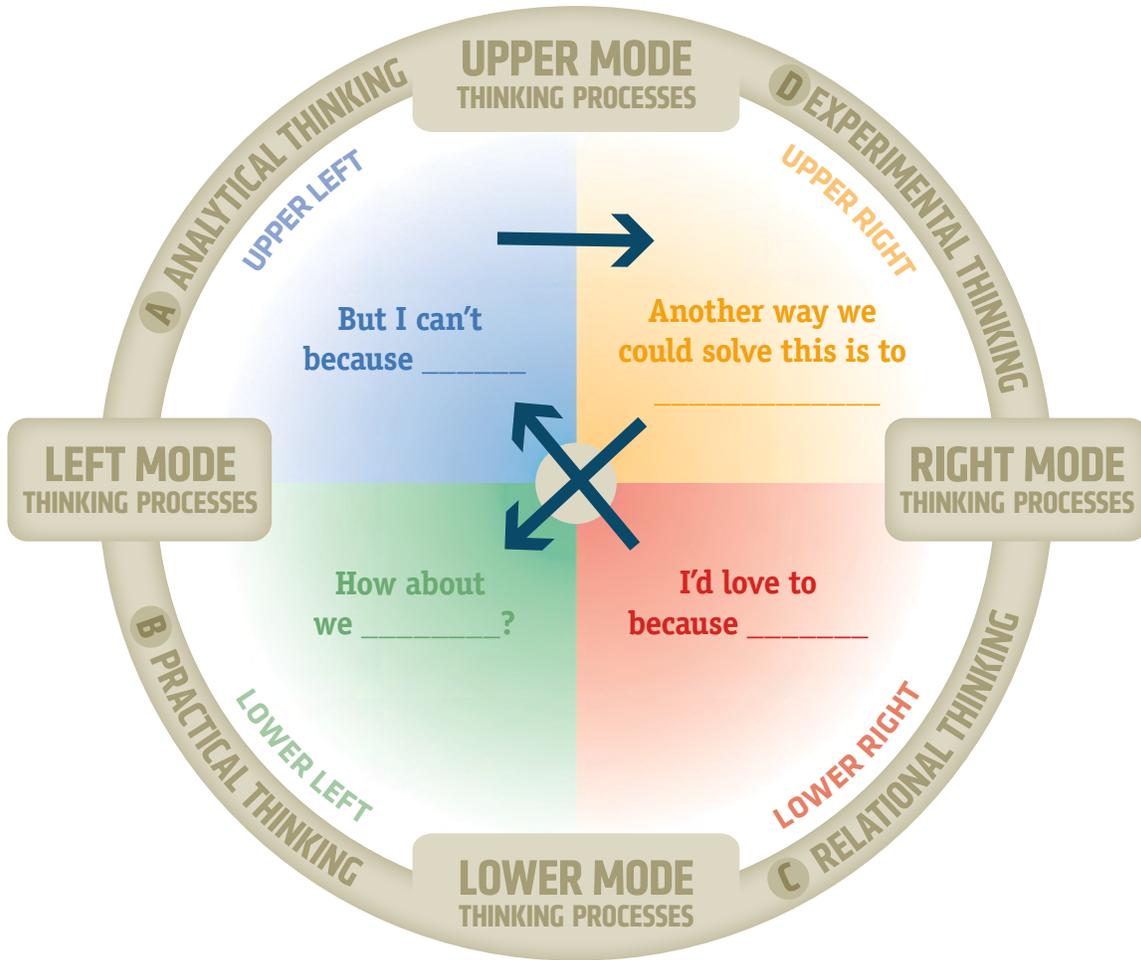
Theme 3

ACTIVITY → Create Your To Don't List

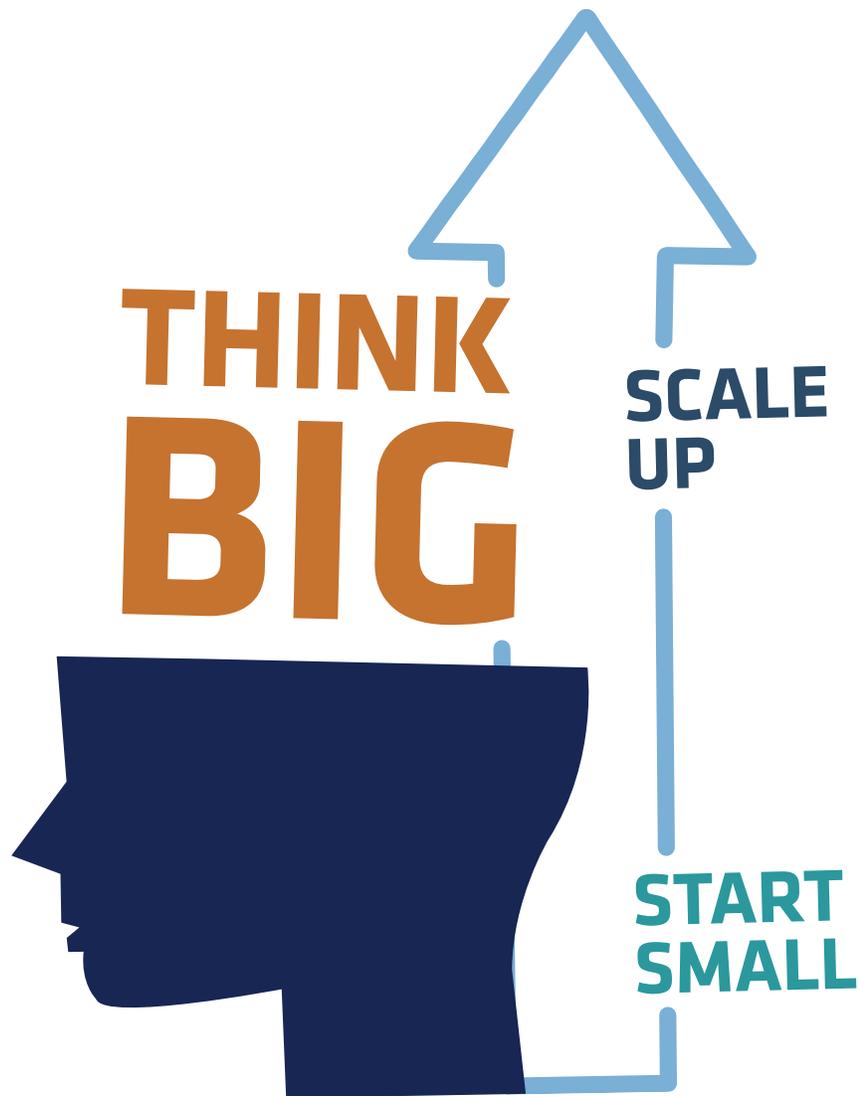
Fill in your To Don't List below. Estimate the number of hours a year you can save with each item, then add up all your savings.

To Don't Items To Avoid Or Minimize	Total Hours Saved Per Year By Eliminating, Delegating, Or Automating
Grand Total Hours Saved →	

➔ How To Say No, Nicely



→ The Sky's The Limit



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Resources

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→ Module 17 **BIG**Finish

In Summary...

- Enhancing your rainmaker skills will give you more control and make you happier.
- All aspects of Whole-Brained Thinking are needed in a plan that drives long-term success. Common wisdom typically focuses on one thing at the expense of others – but it's a plan combining all four thinking styles that accelerates business development success.
- Building a great strategic plan is only half the battle. You'll need consistent execution of your MIT process to make the progress you want.

→ FINAL ACTIVITY

What's the #1 thing you got from GrowBIG® Training?

About Bunnell Idea Group (BIG)

BIG was born in a moment of fear.

Our founder, Mo Bunnell, had just passed all the actuarial exams to reach their highest designation, Fellow of the Society of Actuaries. Mo and his firm orchestrated a role change—Mo went from being rewarded as an expert to one focused on business development (BD) with some of the largest clients at his firm. In general terms, Mo went from senior associate to senior partner in a day, skipping the partner role altogether.

That's when the fear kicked in.

Mo realized there was no “manual” for BD. Success in his new role meant he had to get great at BD, and fast. Why did clients say yes to some offers and not others? How are deep, trusting relationships formed? How can we stay on top of BD, even when we're busy?

Over years of painstaking research and trial and error, the beginnings of a system emerged. Before a system, Mo worked insane hours, got moderate results and was frankly exhausted. After a system, Mo worked reasonable hours, got some of the best results across his entire worldwide organization and thrived on helping his clients succeed. Mo realized he hadn't fallen in love with BD, but teaching others how to develop business in a way that's efficient, comprehensive and most importantly, *authentic*.

Mo started BIG in 2005 with that passion. Things have come a long way since then, including researching 100s of peer-reviewed studies, writing 1000s of pages of training materials and training 10s of thousands of participants, all over the world.

It turns out other seller-experts wanted a system like Mo wanted. Since 2005 we've trained over 20,000 experts at over 500 organizations all over the world: professional service firms like BCG, Goldman Sachs and Oliver Wyman, along with service-based companies like Sotheby's, CVS/Aetna and TransUnion.

Mo's book, *The Snowball System*, was awarded #1 Networking Book at the Axiom Book Awards and a Top 5 Sales and Marketing Book by 800CEOREAD.

For more complimentary resources to help you implement this training, check out www.BunnellIdeaGroup.com, especially the **Start Here** tab.

You can also get direct tips from Mo every week by by signing up for our weekly newsletter at

GrowBIGPlaybook.com

Bunnell Idea Group, Inc.

Sign up for **Mo's podcast** at mo.show

Sign up for our **weekly insights** at: GrowBIGPlaybook.com

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GrowBIG® Integrated System

GrowBIG® Training

- Adopt the Right Mindset by Focusing on a Better Buying Process
- Adapt Your Thinking To Win With Everyone
- Listen And Learn For A Triple Win
- Create Curiosity To Increase Engagement
- Build Everything Together To Get The Yes
- Position Your Offerings Uniquely To Be Chosen More Often
- Talk About Money With Confidence
- Create Demand Through A Relationship Advantage
- Create Demand Through Your Expertise
- Plan And Execute Your BD Meetings To Make Positive Progress
- Craft And Execute Client Growth Plans To Grow Your Impact
- Build Powerful BD Habits
- Assess Your Progress To Move Forward
- Develop Targeting Criteria To Focus Your Efforts
- Foster New Relationships: Broaden Out And Ladder Up
- Gain Traction With Early Stage Relationships
- Grow Your Book Of Business, Your Relationships And Your Career

GrowBIG® Leader Training

- What Makes A Great Growth Leader?
- Developing A Successful Growth Strategy
- Measuring And Celebrating Success
- Coaching Conversations That Drive Growth
- Launch!