

About Connecting with Customers

Our Connecting with Customers session provides customer-facing individuals with a unique insight into themselves and their behaviour at every stage of a sale. By focusing first on increasing self-awareness and adapting their own approach, we help people to improve performance and build stronger connections with customers from their very first contact.

This session supports individuals to deepen their understanding of not only themselves but also their customers, as well as the six important steps to a sales relationship. By exploring the Insights Model of Selling, learners will discover their strengths and weaknesses at each stage, and learn how to develop these to increase their selling success.

Who is it for?

The session is suitable for individuals and teams at all levels who are working in a customer-facing role including:

- In a sales role, or function connecting directly with customers
- Business development or account management teams who are developing relationships with clients
- Anyone who needs to influence other stakeholders as part of their role

By deepening their understanding of others, learners will be able to improve their own approach to connecting with their customers, in both a face-to-face or virtual environment.

Learning objectives

The two-hour session is supported by a pre-session e-module, a personal profile and a post-session module, that learners can use to achieve the learning objectives.

As a result of the session learners will:

- Explore their colour energies, identify when they are overused and how they can be used to improve connections
- Understand their approach throughout the six important stages of a sale
- Develop strategies to build better relationships with customers quickly and effectively



Delivery

The Connecting with Customers session is a two-hour virtual event using virtual conferencing technology. The session is designed so that your learners can enjoy interactive exercises and group discussions, while being guided through engaging learning content by our expert facilitators. Insights facilitated sessions include a producer to support a smooth virtual experience.

Learner commitments

- We want you to be fully engaged with the facilitator, your fellow learners and the materials as you move through this virtual experience
- We encourage you to commit fully to your personal development by completing the self-directed learning
- You will need to complete the pre-learning module prior to this session which covers theory we will be referring to
- A webcam is highly recommended
- You'll need a quiet space to allow full participation and concentration
- If you cannot get a fully private space in your office or home please let everyone around you know you are engaged in a learning experience
- Please treat this programme as if you were in a room with others for a face-to-face experience

Virtual session agenda

The four colour energies in selling

- Examine Insights Discovery colour energies in both a face-to-face and virtual environment
- Review your colour energies, how these show up when connecting with customers and the impact of overusing them

Recognising type - Understanding our customers

- Explore and identify clues to behaviour through the lens of colour energies
- Consider areas for development and how you can build stronger connections

Adapting to connect

- Develop an approach for each step of the model
- Create a strategy to better connect with customers

The Insights Sales Model

- Review your personal profile and deepen knowledge of your unique style of selling
- Explore the Insights sales model together with Sales Preference Indicators, and how colour energies interact with each stage

Virtual learner kit

Every learner will need their virtual learning kit. This kit equips them with the information and tools they need to deepen their learning and take action back in the workplace.

Sales Preference Indicators



Each kit includes:

- **The Insights Discovery Personal Profile and Effective Selling Chapter** – an in-depth, fully customised personal profile that provides the learner with information about their working approach and communication preferences. Every profile comes with the Foundation Chapter, but for this session your learners will also require the Effective Selling Chapter. This chapter helps people understand how they can use their unique style to influence their customers, peers and managers
- **Pre- and post-learning module** – short e-learning modules that learners attend before their session to understand the basic concepts they'll be exploring, and after their session to help retain their learning
- **Strategies for Colourful Customers Job Aid** – this document gives learners a strategy for every step of a sale, for each of the different colour energy preferences
- **Recognising Type for Connecting with Customers Job Aid** – this document helps the learner deepen their understanding of their customers' preferences through the Insights Discovery eight type model
- **Connecting with Customers activity sheet** – this helps learners identify a specific customer and practise recognising behavioural clues and colour preferences. They can then use the sheet to develop their approach for connecting with this customer better