



# For Professionals

*Activating Service Professionals to Support Revenue Growth*

**"Most of our professionals could do a better job of engaging and surfacing incremental opportunities... especially at existing clients.**

**What I'd give to better leverage this asset of ours in the pursuit of better relationships and greater revenue!"**

**- Managing Partner -  
\$450M Professional  
Services Firm**

## Driving Incremental Revenue

Looking for a prescription to enhance client relations while identifying incremental revenue opportunities? An untapped resource lies within your firm's technical delivery staff. Enhancing the skills and rigor around how this group engages its clients and networks with peers can have an enormous impact on your business development and client service efforts.



## The Workshop

"**Rx**- Relationship Xpansion For Professionals" is a high impact, 1 or 2 day workshop created specifically for professionals and consultants – regardless of service discipline. The workshop helps participants expand their business development "comfort zone", enabling them to engage more effectively.

The workshop targets the majority of your delivery staff, and provides pragmatic skills, tools, and behaviors that can be immediately deployed for maximum impact. In addition, participants will develop a customized Relationship Enhancement Activities Plan (REAP) for their own clients. The plan supports the execution of relationship development activities by the participant, and provides a mechanism for oversight and coaching for your firm's management.

The workshop leverages the "Story Centered Curriculum" learning methodology developed by world renowned cognitive learning expert Roger Schank. Participants are immersed in an actual client scenario throughout the workshop. Business development and relationship enhancement skills are aligned with learning objectives, and delivered at critical points of the scenario where students are most open to absorbing the content.

## The Results

- *Increased value to clients, higher quality relationships, enhanced client loyalty*
- *More business development activity, additional opportunities uncovered*
- *Repeatable process for executing and managing these activities*
- *Increased revenue, enhanced deal flow*

## The Business Value

Few initiatives can generate greater return for a services company. Consider the impact of:

- *Quickly elevating your delivery staff's ability to be more attentive to current client needs*
- *Identifying incremental revenue opportunities that would have otherwise gone unnoticed*
- *Securing just one additional opportunity from a current client...*

For more information about the "**Rx** For Professionals" workshop, please contact us by e-mail at [Rx@graymattersgroup.com](mailto:Rx@graymattersgroup.com) or calling 312-523-9023.

## Introduction Module: *Changing Beliefs and Breaking Down Perceptions*

- **Raising the "Value" Bar**
  - Services sector dynamics
  - Insights into client loyalty and differentiation
- **Shifting the Mind Set**
  - Challenges & barriers to success
  - "Demystifying" business development
  - Re-casting beliefs and behaviors to drive desired results



## Module 1: *Insights into Personal Behavior Styles*

- **Understanding DiSC & Applying Behavioral Awareness**
  - Assessing personal and client personal behavioral tendencies
  - Reading and adapting to varying behavioral styles

## Module 2: *Networking & Developing/Communicating Your Elevator Speech*

- **Fundamentals for Relationship Development**
  - Learn approaches for more effective networking with current clients, referral sources and prospects
- **Effectively Communicate Firm & Personal Capabilities**
  - Practice communicating this information clearly and succinctly

## Module 3: *Teaming & Collaboration*

- **Organizing and Aligning Teams for Optimal Execution**

## Module 4: *Research*

- **Internal & External Knowledge Capture:**
  - Developing a deep understanding of your clients'...business, financials, challenges, market, industry, etc.
  - Understanding your firm's and your own capabilities, value proposition, message, differentiators, etc.

## Module 5: *Interaction Preparation, Execution & Management and Follow-Up*

- **Systematic Approach to Preparing for Various Client and Networking Interactions**
  - Purpose of interaction
  - Goals, objectives and desired outcomes
  - Key questions to be asked
  - Critical information to be captured
- **Systematic Approach to Conducting Formal & Informal Interactions**
  - Managing the interaction
  - Approaches to active listening & questioning
  - Uncovering needs, issues & objectives
  - Assimilating information
  - Clarifying priorities & decision making process
  - Establishing action items/next steps
- **Systematic Approach to Following Up on Interactions**
  - Capturing and assessing results of interaction
  - Define responsibilities & deadlines
  - Engaging other resources & hand-offs
  - Plan/initiate next steps & on-going interactions

## Planning Module: *Relationship Enhancement Activities Planning (REAP)*

- **Creation of Executable Plans for Each Student's Client/Constituency Base...90 Day Horizon**
  - Includes engagement activities within their current clients, referrals and prospects
  - Specific goals, targets, activities and due dates are developed

## Final Module: *Wrap Up*

- **Summary of Key Learnings and Linkages into Firm's Business Development Process**  
**\*\* NOTE: Group Coaching Sessions Follow All RX Workshops**



# Workshop Execution Timeline & Activities

## Workshop & Scenario Customization

### Discovery Working Session

- Goals and Objectives for Workshop
- General Workshop Content Review
- Rx Skills Linkage Assessment
- Overview of Business Model Fundamentals
  - Service Lines, Client Profile, Industries, etc.
  - Bus. Development/Go-To-Market Approach
  - Consulting/Service Delivery Model
- Client Situation & Scenario Considerations
- Workshop Delivery Logistics

½ Day Session

### Rx Readiness Assessment Feedback & Client Scenario Development and Content Adaptation

1-2 Weeks

### Workshop Walk Thru

2 Hours



## Relationship Xpansion Workshop Execution

## Rx "Aftercare" Experience

Embedding the Learnings of Rx

### ResultsEngine™ - Support & Results Tracking System

Pushes Weekly Audio Rx "Booster Shots"

- ✓ Audio "podcasts" delivered via e-mail
- ✓ Each 4-5 minute spot focuses on one module from Rx Workshop

Requests Bi or Tri-Weekly Rx Goal/Activity Updates

- ✓ Rx goals/actions captured from students and loaded into system
- ✓ Students asked for updates on progress in the field....activities, next steps, impact, etc.

Streamlines Coaching Interactions

- ✓ Automates triggering of e-mail based coaching exchanges between students and designated client "coaches" and/or Gray Matters Group "experts"

Automates Capture of Impact Examples

- ✓ Requests anecdotes on behavior changes, best practices, new leads identified, etc.
- ✓ Asks for nominations of peers who demonstrate model behavior
  - Anecdotes and nominations can be leveraged in various ways to reinforce behavior

Houses Rx Support Resources

- ✓ Tools & templates
- ✓ "Audio Booster Shots"
- ✓ Suggested "Rx in Action" activities

Provides Easy to Use Leadership Dashboard for Oversight and Accountability

### Group Coaching Session

Takes Place 90 Days After Rx Workshop

- ✓ 2 hours, co-coached w/ client
- ✓ Revisits Rx learnings, students share field experiences applying Rx skills
- ✓ Overall Rx impact established
- ✓ Students recognized for model behavior

Approx. 2-4 Weeks

1 Day

Approximately 12 Weeks

\*\* All above activities included in participant fee