

Coaching Your Team to Qualify More Effectively



CATALYST gives you a complete, customer-centred framework to qualify opportunities with confidence. Use it as a guide to shape your discovery conversations, uncover what truly matters to the customer, and identify where the deal is strong—or where it needs work. Here's how to apply it effectively:

C Start with the customer's reality (C – Challenge / Need)

Explore what problem they're really trying to solve. Ask open questions and dig beneath the surface so you understand the true challenge, not just the symptoms.

A Map out who matters in the decision (A – Authority)

Clarify who makes the decision, who influences it, and who needs to be involved. This stops surprises later and ensures you're speaking to the right people.

T Understand the urgency (T – Timescales)

Find out when they need a solution and what's driving the timeline. This helps you prioritise and align next steps with their expectations.

A Position your value clearly (A – Advantage)

Identify why they would choose you over other options. Make sure your value, differentiation, and impact are fully understood.

L Uncover the emotional drivers (L – Level of Emotion/Pain)

Discover what makes this important—personally or commercially. Strong emotion equals strong urgency.

Y Explore the competitive landscape (Y – Your Competition)

Ask who else they're considering (including doing nothing). This helps you tailor your positioning and handle objections early.

S Size the opportunity properly (S – Size / Scope)

Clarify the scale: sites, people, products, services, volumes, time. This ensures your proposal fits their reality.

T Confirm the financial fit (T – Total Budget / Money)

Understand the budget, approval process, and financial constraints so your solution lands in the right range.

C – Challenge / Need)

- ✓ Operational inefficiencies
- ✓ Technical gaps or failures
- ✓ Productivity blockers
- ✓ Compliance or safety requirements

L – Level of Emotion / Pain

- ✓ Stress or frustration with the current situation
- ✓ Fear of risk, failure, or downtime
- ✓ Desire for stability, certainty, or ease
- ✓ Pressure from leadership or customers

A – Authority

- ✓ Final decision-maker
- ✓ Budget holder
- ✓ Influencers (IT, Ops, Finance, HR)
- ✓ End users who shape the recommendation

Y – Your Competition

- ✓ Other suppliers they are exploring
- ✓ Internal DIY or in-house options
- ✓ Existing vendor relationships
- ✓ The “do nothing” alternative

T – Timescales

- ✓ Contract expiry or renewal dates
- ✓ Project deadlines or go-live targets
- ✓ Seasonal or peak-period pressures
- ✓ Internal milestones driving urgency

S – Size / Scope

- ✓ Number of users, sites, or teams
- ✓ Volume of products or services needed
- ✓ Complexity of the environment
- ✓ Required resources and delivery effort

A – Advantage (Why You?)

- ✓ Unique capabilities you offer
- ✓ Stronger ROI or faster impact
- ✓ Proven results in their industry
- ✓ Better fit for their culture or needs

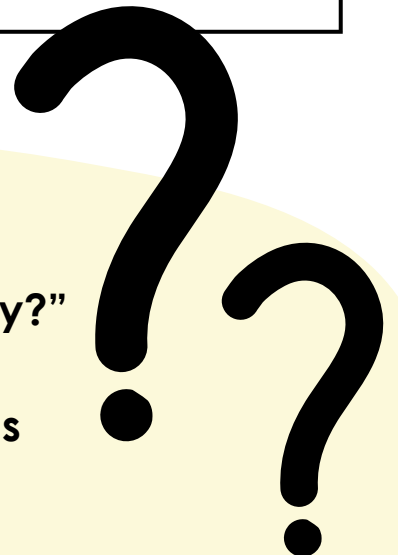
T – Total Budget / Money

- ✓ Available spend or approved budget
- ✓ Financial constraints or caps
- ✓ Funding timelines or approval steps
- ✓ Expected ROI or payback expectations

Coaching Questions to Improve Qualification

“What key information do you still need to confirm before you can confidently progress this opportunity?”

“How does this opportunity align with the customer’s true priorities, challenges, and timelines?”



MEETING MANAGEMENT



Master the essentials of effective meeting management in our focused workshop. We explore strategies to enhance engagement, boost productivity, and deliver maximum value in every meeting.

Participants will gain insights into key aspects of meeting success—from impactful facts and figures on meeting effectiveness to the skills and behaviors that foster engaging discussions. We'll address the unique challenges of in-person vs. virtual meetings, providing strategies to maximize efficiency in each. The workshop covers strategic planning for customer meetings, including cadence-based engagement and setting clear objectives. Learn to craft agendas that drive outcomes, adapt to DISC profiles, and use questioning techniques to uncover insights. By the end, your team will be ready to plan, execute, and follow up on meetings effectively, ensuring strong customer relationships and ongoing business growth.

Tailored Workshop

Each workshop we offer is customised to suit your team's specific needs and align with your business objectives. Whether you prefer virtual sessions, face-to-face workshops, or a combination, we cater to your preferences. Our workshops, which can span one, two, or three days, cover various topics tailored to optimise your team's performance and address your unique challenges.

Topics Available

- Identify Essential Skills and Behaviours for Leading Engaging Meetings
- Understand the Unique Challenges of In-Person vs. Virtual Meetings
- Implement Strategies to Maximise Efficiency in Virtual and In-Person Settings
- Use the Nine-Box Grid (Value vs. Trust) to Identify Customer Meeting Types
- Explore the Benefits of Creating an Annual Customer Meeting Plan
- Set Meeting Objectives: Minimum, Maximum, and Aspirational Goals
- Understand the Importance of Agendas and What to Include for Impact
- Reflect on Your Rapport-Building Skills for Stronger Connections
- Refine Questioning Techniques to Qualify Customer Needs and Goals
- Summarise Meetings Clearly to Avoid Misunderstandings and Assumptions
- Agree on Next Steps to Keep the Sales Process Progressing Smoothly

Additional Resources

Other available resources to support your meeting management workshop;

- Customised consultation to meet your specific needs.
- Complete DISC profiles for the entire team.
- Skill scans for both team members and managers for assessment.
- Implementation of competency frameworks. Integration of managerial best practices.

STRATEGIC PLANNING



Strategic planning takes on many forms, each with its own unique challenges and responsibilities. That's why our workshop is tailored to match your team's specific level of experience, the complexity of their role, and the demands of your business environment.



We design the workshop to focus on the core principles of strategic planning—analysing market trends, setting actionable goals, and aligning resources to drive long-term growth and competitive advantage. Whether your team consists of seasoned strategists or individuals new to strategic planning, this workshop will equip them with the skills needed to craft and execute effective strategies that bridge the gap between your organization's vision and its operational execution, ensuring sustained success and adaptability in a dynamic market.

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Topics Available

- Understand account management's core responsibilities and their impact on client satisfaction and business success.
- Cultivate deep, trusting client relationships through regular communication, understanding their needs, and delivering exceptional service.
- Recognise the importance of a strategic plan to guide account management and achieve long-term success.
- Support account managers to spot and capitalise on new opportunities within existing accounts, including upselling and cross-selling.
- Ensure account managers proactively address issues, act as client advocates, and maintain high satisfaction and loyalty.
- Use a Trust Scorecard to objectively measure and strengthen client relationships, keeping them strong and productive.
- Emphasise internal stakeholder management to ensure your team has the support to meet client demands and exceed expectations.
- Learn time management techniques to prioritise high-impact tasks and client interactions.
- Enhance collaboration and coordination with internal teams to meet client needs efficiently and effectively.
- Focus on deepening client relationships to ensure renewal, retention, and account expansion.
- Strengthen market knowledge with SWOT and PEST analysis to stay ahead of trends and better serve clients.

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SALES 101



This fundamental sales workshop caters to individuals newly entering sales roles, those currently overseeing sales without formal training, and team members in customer-facing positions who play a strategic role in supporting the sales process. Designed to build essential skills and confidence, the workshop covers the foundational principles of effective selling, focusing on techniques to identify customer needs, communicate value, and establish trust.



Additionally, participants will be introduced to consultative selling—a customer-centric approach that emphasises understanding the customer's unique challenges and tailoring solutions to meet their specific goals. By learning to ask insightful questions, listen actively, and creating meaningful conversations, delegates will gain tools to build stronger, long-term relationships and drive more successful outcomes for both the customer and the business.

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Topics Available

- What is Consultative Selling?
- Exploring Various Communication Styles with DISC
- Essential Skills for Successful Sales Processes
- Activities for Maintaining a Healthy Sales Pipeline
- Understanding the Customer's Buying Process
- Lead Generation Strategies and Techniques
- Building Rapport: Definition and Strategies
- Identifying Gatekeepers and Effective Strategies for Dealing with Them
- Crafting a Professional Introduction
- Key Questions to Ask Your Customers
- Matching Your Product to Customer Needs
- Strategies for Overcoming Objections
- The Art of Closing and Effective Follow-Up Techniques

Additional Resources

Other available resources to support your Sales 101 workshop;

- Customised consultation to meet your specific needs.
- Complete DISC profiles for the entire team.
- Skill scans for both team members and managers for assessment.
- Implementation of competency frameworks. Integration of managerial best practices.

SALES MANAGEMENT



The Sales Management workshop is designed to enhance your skills as a sales leader. It focuses on key areas that drive team performance and individual growth. With various topics to choose from, you will learn to distinguish between management and leadership and identify your unique style. You will explore how to set meaningful targets and create a high-performance culture within your team by establishing a productive team rhythm of informal conversations, 121s, and performance reviews.

You will recognise the need to choose different techniques for each salesperson, from training to mentoring and coaching, to create a high-performing team. Overall, this workshop aims to give you tools and techniques if you are new to sales management or have never received formal training, gaining the confidence to lead a sales team.



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Topics Available

- Understand the Distinction Between Management and Leadership Skills
- Identify Strengths and Areas for Improvement in Your Personal Style
- Explore the Key Competencies and Skills Needed for Your Team's Success
- Develop a Consistent Rhythm for Team Development
- Differentiate Between Informal Conversations, 1:1 Meetings, and Performance Reviews
- Hold Your Team Accountable for Delivering Results
- Set Quantitative and Qualitative Targets with Meaningful KPIs
- Ensure Your Team Focuses on High-Impact Activities to Achieve Their Goals
- Apply the Right Combination of Skills to Drive Team Growth
- Create an Environment for Open, Constructive Feedback

- Build Confidence in Managing Difficult or Challenging Conversations
- Encourage Independence and Growth in Your Team Through Coaching
- Learn How to Build and Sustain a High-Performance Team

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