

Coaching Your Team to Navigate Stakeholders



Understanding who truly influences a customer's decision is essential for effective account development. Relying on just one contact creates risk, slows progress, and limits opportunity. Stakeholder mapping helps your team see the full picture—who the key players are, how they connect, and where relationships need strengthening. Use this cheat sheet to coach your team to map stakeholders with confidence and build broader, more resilient account relationships.

LOOK

Look beyond your main contact

Identify the Full Buying Circle

Look beyond your main contact.

Include:

- ✓ Economic Buyer
- ✓ Technical influencers
- ✓ Users
- ✓ Finance
- ✓ Risk, Compliance, or IT Security
- ✓ Project sponsors

GOALS

Capture Personal Drivers

Stakeholder decisions aren't purely logical. Note:

- ✓ Their goals
- ✓ Their pressures
- ✓ What success means to them
- ✓ What they're worried about

This is where real persuasion begins.

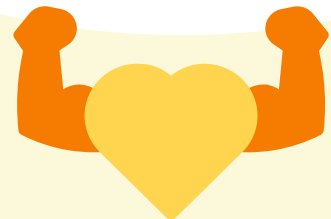


Understand Roles & Influence

Plot who decides, who influences, who blocks, and who supports.

Consider:

- Who sets the criteria?
- Who signs off budget?
- Who feels the pain most?
- Who has the power to stall a deal?



Map Relationship Strength

Score each contact

- Strong
- Neutral
- Weak

... and identify where you need to invest time and connection.



Track Influence Lines ("Who knows who")

Draw arrows to show:

- ➡ Internal alliances
- ➡ Authority chains
- ➡ Hidden influencers
- ➡ People who quietly shape decisions

This helps you avoid surprises later in the process.



Build a Stakeholder Action Plan

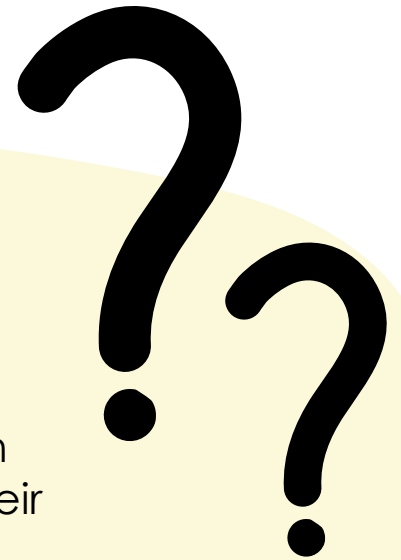
For each contact, define:

- What they need from you
- The relationship goal
- Your next step
- What value can you add

This turns your map into a living strategy, not a static picture.

Coaching Questions for stakeholder mapping

- Who are the key influencers beyond your main contact, and how confident are you about their role?
- Where are the gaps in your stakeholder map, and what's your plan to fill them?
- Which relationships are currently weakest, and what specific action can you take to strengthen them?
- Who ultimately signs off, who shapes the criteria, and who can quietly block progress?
- What personal drivers, concerns, or goals does each stakeholder have—and how can you align with them?
- How well does your internal team know this account, and who else could you bring in to build wider trust?



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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