

Facilitation by Meeting Type (Use this in conjunction with Chapter 4)

Meeting Type	Meeting Purpose	Facilitator Presence
Discovery	Qualify and explore the scope of an opportunity with a prospect or existing buyer.	<ul style="list-style-type: none"> • Connect • Engage • Establish credibility • Show vulnerability
Presentation (Insight, Education, or Solution)	Offer a thought-provoking insight, educate the client on some aspect of the proposed solution, and present the value of your product or solution.	<ul style="list-style-type: none"> • Be passionate • Influence • Inspire • Persuade
Conflict Resolution	Resolve issue(s) that are preventing a buyer from agreeing to move forward with a deal, or address dissatisfaction in an existing relationship.	<ul style="list-style-type: none"> • Be curious • Be careful • Be courageous • Offer your contribution • Don't forget to breathe
Problem Solving	Collaborate with the buyer by pooling experience and expertise to identify creative or innovative solutions to challenging problems.	<ul style="list-style-type: none"> • Collaborate • Facilitate • Be flexible • Be creative

Facilitation by Meeting Type (Use this in conjunction with Chapter 4)

In a sale with any degree of complexity, it is unlikely that the deal will be closed at the conclusion of the first meeting. Therefore, as you manage through the sales cycle with a prospective or existing buyer, different meetings will likely have different structures.

Facilitator Role

Before the meeting, they do the following:

- define the purpose of the meeting and create and circulate the agenda
- ensure the right people are invited
- coordinate logistics, including time, location, equipment, and refreshments

During the meeting, they do the following:

- create a warm and friendly atmosphere
- are interested and engaging
- manage time
- review the agenda and meeting objectives
- keep discussions on track
- ensure all voices are heard, particularly the buyer's
- remain aware of and responsive to the overall meeting and interpersonal dynamics as they evolve and shift; address those that could hurt the meeting objectives
- ask appropriate questions to stimulate conversation
- listen for what is being said and *not* said
- summarize the main points and reframe when necessary
- identify and coordinate next steps

Facilitator Role

Meeting Type: Discovery Meeting

The classic consultative sales process emphasizes discovery of the buyer's needs as a precursor to presenting a solution. Facilitating a discovery meeting, as the title implies, means placing an emphasis on learning as much as you can about the buyer's situation. I have covered this process in some detail in chapter 2.

In a discovery meeting, focus on the following:

- creating psychological safety, through behaviors like including taking time to connect with and engage your audience, and being vulnerable
- asking questions to understand
- reframing and summarizing what is said during the meeting
- avoiding the allure of presenting prematurely
- agreeing on next steps

Meeting Type: Sales-Presentation Meeting

For some sales professionals, presenting is their moment of glory. They get to shine in the spotlight and talk about their insight, products or services. For others, particularly when presenting to groups, there is some degree of anxiety attached to making the presentation or pitch.

When presenting an insight or proposing a solution, you should do the following:

- ensure it is relevant to your buyer.
- have a vertical takeoff.
- tell stories that use data to support your key points.

Telling stories. Here are some tips for how to craft an effective business-related story in your sales presentation. Your story will be relevant if you use the following structure:

- *Start with a business context.* “Our customer service score has improved by ___ percent”
- *Tell the story.* “How this trend began was last year we ...”
- *Say what you learned from the story.* “We heard loud and clear ...”
- *Translate what it means to this buyer.* “What this means to you ...”

Your story will be well told if you use the following techniques:

- *Create emotional resonance.* Tell a story that will resonate at an emotional level with your audience.
- *Use bullet phrases.* Rather than long, descriptive sentences, use concise language that lets your buyer draw conclusions.
- *Use your body, face, and voice.* Your body is a 3-D picture. Use it instead of words.

Meeting Type: Conflict Resolution

Conflict—any form of disagreement, objection, pushback, or resistance by the buyer—can happen at any time in a meeting or at any point in the sales cycle. How these exchanges are handled can define a relationship with an existing buyer or end the potential for a new one. In these moments, rather than staying present, we can experience the classic fight, flight, or freeze moment.

It is incumbent on the sales professional facilitating the meeting to engage with the buyer in a way that

- signals a clear intention to understand the source of the conflict
- conveys a desire to work toward a resolution
- avoids becoming defensive, going on the attack, or withdrawing mentally
- doesn't devolve into an "I'm right, you're wrong" stance; and
- engages the four Cs of successfully navigating conflict
 - **Curiosity**—A desire to understand the issue from the other person's perspective. **We need to** engage/reengage our questioning and listening skills.
 - **Courage**—The ability to tell the truth about your thoughts and feelings, and the willingness to hear the other's thoughts and feelings. Sometimes the latter can be particularly difficult!
 - **Carefulness**—The ability to express yourself in a way that makes your good intentions clear and minimizes negative impact. This includes focusing on the issue and not the person or people and orienting yourself in a way that demonstrates the importance of the relationship.
 - **Contribution**—A willingness to offer what you have done to contribute to the creation of the issue or situation. This one takes a willingness to be vulnerable.

Meeting Type: Problem-Solving Meeting

Because of the volatile and uncertain economic and business environment in which we all live, we need to be able to facilitate problem-solving meetings. Uncertainty implies that we don't always have the immediate answers to our buyers' problems. We need to be capable of facilitating a problem-solving meeting to hopefully help our buyers ultimately decide that we can be part of the solution.

What follows are the typical steps in a problem-solving meeting:

1. **Have a Problem Statement.** In a typical problem-solving meeting process, the first task is to create a clear statement of the issue or problem; this is the headline that clearly and concisely identifies what the focus of the meeting is.
2. **Review Background Materials.** The next step in the meeting is to review background materials; this includes any details or data that will help guide the attendees' thinking and may include what's been tried in the past, what has worked and not worked, and so on. Some of this detail may be supplied in advance of the meeting.
3. **Idea Generation and Evaluation.** Once the group has a sufficient grasp of the background, they move to the generation and evaluation of ideas. These are the steps where attendees are encouraged to think creatively and offer ideas on how to address the problem.
4. **Healthy Debate and Critique.** The traditional creative problem-solving model refers to this step as brainstorming, where ideas are offered, often in rapid-fire format, without judgment or evaluation. The idea is that the emphasis on quantity over quality will ultimately surface the ideal solution. However, research out of the University of California has shown that an environment of healthy debate and critiquing ideas actually creates the most robust and implementable ideas.⁸
5. **Create Implementation Plan.** Once the group has identified the best alternative, their work then becomes creating the implementation plan. This includes a summary of action items, who is responsible for each item, and deadlines for completion, including interim check-in deadlines.

The right presence in the role of facilitator can make this type of meeting fun, creative, and productive.

In a problem-solving meeting, focus on the following:

- creating a collaborative environment
- encouraging creativity
- being flexible in the ways you respond to the unplanned-for or unexpected