



1. Engaging Customers at the Executive Level

- Why do we need to access the executive level?
- The challenge of selling to the executive level
- The role executives play in the buying process
- The “bottom up” vs. “top down” buying process
- How, when, and why to engage at the executive level

Sales Tool: Executive Buying Roles Assessment

3. Linking Your Solutions to Executive-Level Goals

- The three key objectives of every for-profit company
- How executives develop objectives and initiatives
- Tying your solutions to executive-level initiatives
- Crafting executive-level business solutions
- Translating value across the enterprise

Sales Tool: Business Value Hierarchy Worksheet

5. Earning Access to the Executive Level

- 6 major strategies to access the executive level
- Understanding and leveraging gatekeepers
- Leveraging your own executive management team
- Executive-level networking and referrals
- Leveraging peer-to-peer executive introductions

Sales Tool: Executive Access Plan

7. Conducting Effective Executive-Level Meetings

- Preparing for your VP or C-Level meeting
- Objectives of your first executive-level meeting
- Facilitating executive-level conversations
- Crafting effective diagnostic questions
- Diagnostic questioning at the executive level

Sales Tool: Executive Meeting Planner

9. Reading and Leveraging Financial Statements

- Understanding business performance metrics
- The Profit and Loss Statement (P&L)
- The Balance Sheet
- The Statement of Cash Flows
- How to leverage financial statements in selling

Sales Tool: Financial Statement Analysis Worksheet

11. Presenting to the Executive Level

- The time and place for an executive presentation
- The goals of an executive-level presentation
- The structure of an effective executive presentation
- Creating alignment and gaining commitment
- Leveraging the Executive Presentation Template

Sales Tool: Executive Presentation Template

2. Speaking the Language of the Senior Executive

- Understanding the world of the senior-level executive
- Executive-level roles and responsibilities
- Linking your solutions to executive-level goals
- Developing your business acumen and vocabulary
- Becoming conversant in the language of business

Sales Tool: Executive Language Worksheet

4. Preparing to Engage at the Executive Level

- Understanding your customer’s business
- Conducting meaningful company research
- Compiling useful executive research
- Establishing your executive-level account strategy
- Defining your executive value hypothesis

Sales Tool: Executive Value Hypothesis Worksheet

6. Approaching the Executive Level Directly

- Establishing an executive approach process
- Defining specific executive approach plans
- Using a multi-pronged approach pattern
- Earning the initial executive-level conversation
- Turning executive conversations into opportunities

Sales Tool: Executive Level Approach Plan

8. Obtaining Executive-Level Sponsorship

- Establishing a shared definition of “success”
- Positioning and proposing your solution
- Demonstrating the “linkage” between your solutions and executive-level business goals and initiatives
- Obtaining executive-level sponsorship

Sales Tool: Executive Alignment Worksheet

10. Developing an Executive-Level Business Case

- Demystifying return on investment
- Ways that return on investment can be calculated
- Developing return on investment projections
- Constructing an ROI analysis and business case
- Leveraging your business case at the executive level

Sales Tool: Executive Business Case Template

12. Closing Business at the Executive Level

- Staying engaged at the executive level
- Keeping the executive involved in the process
- Developing momentum in the buying process
- Trouble-shooting the buying process
- Using the Customer Results Plan at the executive level

Sales Tool: Customer Results Plan Template