CAPONI PERFORMANCE GROUP, INC.

Creating Top Performers

Caponi Performance Group Overview

Our Three Core Disciplines
Workshop Methodologies

301 Highland Ct., Double Oak, TX 75077
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CAPONI PERFORMANCE GROUP, INC.
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MASTERING SALES SERIES

Who We are

and What We Do

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Who We Are and What We Do

Caponi Performance Group is, simply put, a sales improvement company focusing on increasing top line revenue in 'Business to Business' selling environments. We deliver the necessary methodologies, which include the processes, tools, and techniques to help our clients achieve their stated goals.

Our business is split into three disciplines. Those are sales and sales management training, sales management consulting and speaking engagements.

In the consulting area, we deliver basically two services; process improvement and surrogate sales management.

In the sales training area, we deliver specifically tailored face-to-face workshops built on process-driven, sales methodologies, with emphasis on **tactical techniques that are practiced during the workshops** that can actually be applied in the field the very next day. What additionally differentiates us from our competition are the follow-through activities we build into our programs during the weeks directly after the actual workshops. Our follow-through activities acknowledge human nature and the repetition needed to change habits and develop new skills. When implemented with client management support they dramatically increase the level of of the acceptance and implementation of what we teach (and the continuing ROI on the training investment).

In the speaking arena, Barry Caponi is known as a dynamic and engaging public speaker. He has spoken to basically three types of audiences; sales forces and/or sales managers, senior non-sales management or general business audiences. Topics are general motivation, sales and sales management oriented and are usually customized to the concerns and challenges of the audience as well as the setting.

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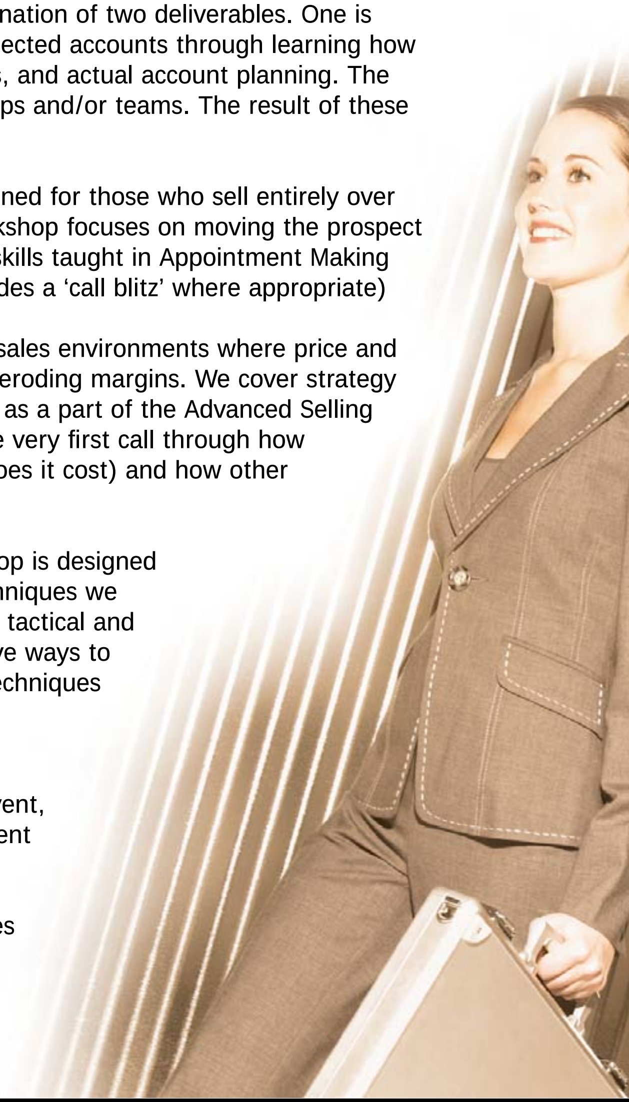
Mastering Sales Series of Sales Training Workshops

THE APPOINTMENT MAKING PROCESS (1 ½ days) – how to set appointments whether they be into existing accounts, from networking and the development of 'warm leads', or outright 'cold calling' (includes a 'call blitz')

TACTICAL OPPORTUNITY MANAGEMENT (1 day) – how to manage prospects through a defined sales process using a common language, shorten sales cycles, strategize opportunities and forecast accurately

BASIC AND ADVANCED SELLING AND QUESTIONING SKILLS (variable and sometimes delivered as a series - 1 day to 3 days) – this workshop can be delivered as a Sales 101 level workshop for inexperienced sales reps all the way to a Sales 501 graduate school level for grizzled veterans. We cover everything from how and why people make decisions and respond to requests, to how plan and deliver an effective sales call. We include exercises on what needs to be learned in order to qualify and close, and how to ask the questions to get the information we determine is necessary in those exercises (can include video taping of role playing)

MAJOR ACCOUNT SELLING (1 ½ days) – this workshop is a combination of two deliverables. One is how to move from a 'Vendor' status to a 'Trusted Partner' status with selected accounts through learning how to sell to 'C' level executives, SWOT exercises, how to prioritize accounts, and actual account planning. The second deliverable is the facilitation of actual account planning by the reps and/or teams. The result of these workshops are plans that can be implemented



TELEPHONE SELLING SKILLS (1 ½ days) – this workshop is designed for those who sell entirely over the phone, whether it be inbound, outbound or a combination. The workshop focuses on moving the prospect efficiently through a defined selling process that combines some of the skills taught in Appointment Making and those from Basic and Advanced Selling and Questioning Skills (includes a 'call blitz' where appropriate)

NEGOTIATION SKILLS (1 day) – this workshop is designed for the sales environments where price and other deliverables are invariably negotiated at the end of buying cycles, eroding margins. We cover strategy development as well as the tactics. This is very effective when delivered as a part of the Advanced Selling and Questioning Skills workshop as the negotiative process begins in the very first call through how sales reps answer certain questions are answered (such as how much does it cost) and how other things are positioned

SALES MANAGEMENT COACHING SKILLS (1 day) – this workshop is designed to help sales managers become more proactive managers using the techniques we teach in the workshops. It helps managers understand how to apply the tactical and measurable methods in positive and constructive manners versus punitive ways to build more success and teamwork within the sales teams. In addition, techniques for running productive sales meetings are discussed

NETWORKING SKILLS (1/2 day) – how to efficiently network, with emphasis on how networking really works, planning attendance at an event, or using a network for gaining an introduction or information, development of 'twenty second introductory commercials'

GOAL SETTING (1/2 day) – simple techniques to effectively build sales plans as well as life plans. Includes exercises (time permitting) and the development of a set of goals

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Consulting Services

>>SURROGATE SALES MANAGEMENT

In organizations where revenue does not yet support full time sales management, focus on sales is sometimes not possible. We have the capacity to become a part time sales manager, installing processes, tools and the discipline necessary to grow revenue to the point where a full time manager is sustainable.

PROCESS IMPROVEMENT: the study of current methods of operation to determine areas for improvement. We explore and make recommendations where necessary in areas such as:

Overall sales management

- What is our cost of sales as a percentage of revenue? Is it in line with our industry?
- What should we monitor, how and why?
- Do we have the right processes, tools, resources and management policies in place?
- Is sales and marketing in synch? Is our sales team spending too much time doing lead generation, for instance?
- Are territories efficiently aligned?
- Is it time to split sales up and create account managers for existing customers?

Best practices development

- This can be delivered as a part of sales training (and is listed there as well)
- What is the best way to approach and sell to a suspect?

Buying cycle and process improvement

- Are sales taking too long to happen? Do we have the right steps defined in the process? Do we need to combine steps, add steps, or refine steps? Do we have the right resources and tools to do the job efficiently?
- Are our closing ratios appropriate for our industry? If not, what can we do about it?

Supervisory improvement

- How good are we at improving individual sales team members' performance?
- Can we break down the sales process into a granular, measurable process in order to determine where a rep needs improvement?

Forecasting accuracy

- How accurate are our forecasts? Do we follow a methodology, or are we a spreadsheet 'seat of the pants' forecasting team?
- How far in advance can we see a revenue shortfall and what steps can we take to remedy it (other than 'make more calls')?

Sales force design and deployment

- Territory design
- Quota assignment
- Team design (major account, targeted account, geographical territories, account management, inside sales, sales support)
- Compensation design
- Hiring profiles and techniques

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MASTERING SALES SERIES

Face-to-Face Sales

Training Workshops Overview

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Mastering Sales Series
Face-to-Face Sales Training Workshops Overview

TYPICAL SELLING ENVIRONMENTS INCLUDE

- Business to business (B2B) markets
- Multi-call buying cycles
- Products and/or services
- Simple or complex solutions
- Large and small dollar priced solutions
- Face-to-face and telephone selling
- Direct selling models
- Indirect selling models including manufacturer's rep, reseller, selling alliances and distributor environments

Our Approach

CPG's Mastering Sales series of sales training workshops are designed to cover the basic selling skills for corporate B2B sales forces and to be applicable to most industries and sales disciplines. Our methodologies are meant to be more tactical and 'how-to' oriented, rather than esoteric or conceptual in nature. Our goal is to provide techniques that can be applied to ongoing and new sales situations the very next day after the conclusion of our workshops without much effort. It is one of the reasons why our ROI is generally so quickly realized (see below). We also believe that a sales cycle (we call them buying cycles) consists of five key measurable steps and metrics. That means that those metrics can be monitored, measured, and therefore managed by providing sales managers with quantifiable data to coach sales reps to improved performance as well as head off revenue shortfalls before it is too late. We also can recommend automated software to help in the process of monitoring those key metrics.

What We Don't Do

As equally important as to what we do, is what we don't do. We do not teach public speaking and presentation skills, nor do we teach leadership skills or deliver motivational training (although our clients report that their participants are certainly motivated by what they learn). We can direct you to some outstanding individuals that deliver those services if you wish.

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The Workshops

CPG offers quite a few different face-to-face training programs that comprise our Mastering Sales Series of workshops. You'll find outlines of the several of our most popular ones (the first four in the list below) attached to this document.

- Appointment Making – (1 ½ days)
- Tactical Opportunity Management – TOM (Forecasting and buying cycle effectiveness - 1 day)
- Basic and Advanced Selling and Questioning Skills (1 – 3 days)
- Telephone Selling Skills (1 ½ days)
- Major Account Selling (1 ½ days)
- Negotiation Skills in Selling (1 day)
- Sales Management Coaching Skills (1 day)
- Networking Skills (1/2 day)
- Goal Setting –business and/or personal (1/2 day)

If you have challenges that go beyond these, or have challenges that include multiple disciplines, please let us design a program for you that either includes a multiple workshop program, or a custom designed single workshop.

Customization

Most companies have unique selling challenges that don't always fit a particular sales methodology or model. As our methodologies and techniques incorporate many of the industries best and brightest sales minds, we design the appropriate mix of methodology and technique to each client organization. That is why we call our deliverables 'Workshops'. As workshops, they are designed to be modified to fit the particular challenges of our client's environments, including those that have multiple challenges within a sales force. As a matter of course, each of the workshops contains some customization, as the workbooks delivered to the participants are modified to at least contain company and product or service references and industry jargon, so that students feel the material is not being 'forced to fit'. For instance, the Major Account Selling workshop usually includes actual account reviews and planning sessions for each account so that the deliverables of the workshop include actionable sales plans that can be put into use immediately after the sessions. Indirect selling models also generally require a fair amount of customization to fit the selling model, market and product set.

We also design ongoing programs that take into account the most immediate needs of your sales force and build multi-workshop programs that are run over a period of months or a fiscal year.

Additionally, for larger sales forces, we offer a train-the-trainer approach that allows you to license and deliver our workshops on a more flexible and cost effective manner.

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Follow-through Methods

CPG also believes that no training program should be viewed as an individual stand-alone event, but as a process and a journey. Stephen Covey believes it takes twenty-one days to make or break a habit. We therefore build into each program, assigned homework and a series of bi-weekly follow-through steps with both sales management and the sales staff, which will vary with each program and each organization's specific challenges. Most are designed with three sessions designed to transfer the follow-through knowledge to sales management. By the third one, sales management should be performing the follow-through sessions without CPG assistance.

EXAMPLES OF THOSE STEPS ARE AS FOLLOWS:

- The selling skill workshops include assigned homework at the end of the programs designed to keep the process of learning going. CPG staff reviews that homework and then can either share our thoughts with sales management and/or the participants themselves based on the design of our follow-through sessions
- The TOM (Tactical Opportunity Management) pipeline review phone sessions with the sales teams are designed to review their sales funnel to reinforce techniques to focus on right opportunities, strategize effectively, and forecast accurately for TOM
- The Appointment Making sessions review the raw results as well as the ratios, practice techniques to assure proper usage and tweak approaches where necessary
- Optional web-based appointment making support software designed to reinforce the key metrics of CPG's selling model and track prospects
- CDs and books from authors that our methodologies and techniques are built upon as appropriate
- Newsletter published by Caponi Performance Group on a periodic basis
- Access to the www.caponipg.com website, where concepts, ideas, tips, and success stories, etc. can be found
- Workshop workbooks in which participants make their own notes to go along with the teaching materials are designed to be used as follow-through documents
- Individual consulting services that are custom designed to fit the challenges of a particular sales organization, including surrogate sales management oversight for smaller organizations

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Return On Investment Calculations

Generally, a return of, and on, the investment made in training occurs within a very short period of time. Additionally, the return is also generally substantial, with many of our clients getting a return of their investment within a buying cycle through an increase in sales they would have ordinarily lost, never competed for, increased size of sale, or shortened sales cycle. For example, it is not unusual for many clients to see an increase in initial meetings set of 40% or more in the first few weeks coming out of training. As initial meetings are the precursor to the sales process, an increase in sales generally also follows. Although difficult to quantify, one of the deliverables of the Tactical Opportunity Management workshop is an accurate and realistic pipeline/ forecast. Many of our clients, as sobering as it can sometimes be, believe this deliverable alone is worth the investment of time and money. Obviously, returns vary with the commitment made by management to the level of enforcement and implementation of the methodologies.

It is our opinion that prospective clients should view the cost of sales training as an investment. And as we believe in measuring everything we do, we stand ready to help you determine how to measure a return on the investment of CPG training workshops with you prior to you agreeing to use our training through the use of our Activity Calculator.

Workshop Training Methodology:

There are basically three ways people learn: kinesthetically (by doing), visually, and through listening. As the population is split almost evenly (38%, 34% and 29% respectively), we use a combination of all three manners in our workshops to help all students learn equally, no matter what kind of “learner” they are.

THEREFORE, WE USE THE FOLLOWING TRAINING TECHNIQUES IN OUR WORKSHOPS:

- Interactive lecture presented through PowerPoint, white-board and flip-chart media peppered with humor, stories and thought provoking questions to keep participants engaged
- Group and break-out discussions designed to get participants to engage in designing the specifics of their approaches where appropriate so that they ‘own’ what they will use
- Written exercises and ‘fill in the blank’ workbooks to keep participants engaged throughout
- Role playing in small groups (designed to foster participation without embarrassment of getting up in front of the whole group)
- Real life work – getting on the phone in Appointment Making, real account reviews in Major Account Selling, real pipeline review in Tactical Opportunity Management
- Optional video taping of role playing sessions for follow-through work and optional audio taping in Appointment Making

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