

Sample Program Designs and Module Descriptions

This document provide Sample program outlines for Trusted Advisor, Trust-based Selling®, and Leading with Trust sessions. This paper helps you design a program to meet your needs.

Design Customization

Programs are semi-customized on two dimensions:

- emphasis—mix of trust-based sales, relationship management, leadership development
- length—keynote vs. 2-hour, half-day or full-day seminar

The program design table on the next page shows how some standard topics are treated in different lengths of programs.

Client Customization

Besides the semi-customization dimensions above, we uniquely design each program to reflect your industry, your company, and your needs.

This is not a matter of adding “industry-relevant” jargon and examples, or even of understanding your objectives for the program. We insist on spending some time to make sure we understand your business, your keys for success, your strategy, and your company’s culture.

Charles’ 30 years in general management consulting and teaching ensure he will understand your business and your needs in a broad strategic context.

That is what we mean by customization.



Charles H. Green is represented exclusively by



I. Program Design

Program Module	---- Length of Program ----			
	Keynote	2-hour	Half-day	1-2 day
Recommended Audience Size	> 100	40-150	20-75	15-35
Trust Core: Trust Equation, Trust Process, Levels of Relationship	√	√	√	√
Name the Firm (Exercise)		√	√	√
Trust, Selling and Buying	√	√	√	√
Myths about Trust and Sales	√	√	√	√
Buying exercise: The Travel Agent		√	√	√
Sales exercise: customized				√
3-Level Listening to Earn the Right (client-specific exercise)			√	√
Follow the Client			√	√
Crafting the Conversation with Trust			√	√
Trust-based negotiation (including role-plays)				√
Handing difficult issues with trust		√	√	√
Handling difficult issues (exercise)			√	√
Workshop to apply trust principles to live, current issues				√
Cross-selling			√	√
Cross-selling role-play exercise				√
Take-Aways from group			√	√
Top 10 Action Items	√	√	√	√

Note: the depth of some modules varies as well with length of program.

II. Program Outlines

The following program outlines are taken from real client programs. Each refers to modules, which are outlined in the back. Modules are customized (some more than others) to fit the client situation.

Each program is a **blend** of emphases on **Trusted Advisor** and **Trust-based Selling®**, as indicated by the **placement of the “X” on the continuum** between the two. **Leading with Trust** programs will represent yet another dimension.

A. Sample one-day program for legal department of a bank



Start	Module
AM	Trust Dynamics
9:00	Trust, Relationships and Influence: the Trust Equation, Trust Myths
9:45	Great Examples of Influence
10:30	Break
10:45	Trust and the Influence Process
11:15	3-Level Listening to Earn the Right (breakout real-client exercise)
12:00	Lunch
PM	Crafting Trust-Based Conversations
14:00	Creating Trust in Conversations
14:15	Trust Creation Exercises 1 and 2: The Staffing Problem; the Difficult Client
15:00	Real-client Application: Small Groups
16:00	Take-Aways for the Day, Top 10 List of Actions
16:30	End

B. Sample One-day program for a reinsurance client

Trusted
Advisor

Trust-based
Selling

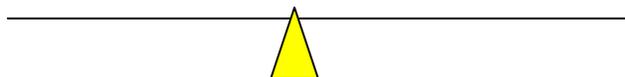


Start	Module
AM	Trust Dynamics
8:30	Expectations: What's So Hard About This?
9:00	Trust, Relationships, and Selling—Key Concepts
9:40	Name That Firm (tabletop exercise)
10:00	Break
10:20	Great Examples of Selling Buying (Exercise)
11:00	The Trust Development Process: Crafting Trust-Based Conversations (incl. 1 st two role-play exercises)
12:00	Lunch
PM	Crafting Trust-Based Conversations
1:00	Trust Development Process cont.: The Language of Trust (tabletop exercise)
1:15	Trust Development Process cont.: The SuperWare Case
1:40	Sales Exercise: The Travel Agent (role-play exercise)
2:05	Break
2:25	Name It and Claim It (incl. role-play exercises)
3:05	Trusted Advisor Self-Diagnostic
3:30	Applying the Trust Process in Real Conversations: (breakout groups)
4:40	Discussion: Building Trust Within an Organization
5:00	Take-Aways, Top 10 Actions (including wallet cards)
5:30	End

C. Sample Half-day program for Tax Managers at Big 4 Firm

Trusted
Advisor

Trust-based
Selling



Wed	Thurs	Thurs	Fri	Module
PM	AM	PM	AM	
1:35	8:00	2:40	8:00	Intro: Trust, Relationships, and Selling
2:15	8:40	3:20	8:40	Name the Firm (tabletop exercise)
2:35	9:00	3:40	9:00	Great Examples of Selling Buying (group exercise)
3:15	9:40	4:20	9:40	The Trust Development Process: Crafting Trust-Based Conversations (incl. caselets)
3:55	10:15	5:00	10:15	Break
4:15	10:35	5:20	10:35	Live Client 3-Level Listening
4:45	11:05	5:50	11:05	Name It and Claim It (including caselets)
5:30	11:50	6:35	11:50	Take-Aways
5:40	12:00	6:45	12:00	End

D. Sample One-day program for Partners/Managers at an Accounting Firm

Trusted
Advisor



Trust-based
Selling

Start	Module
AM	Trust Dynamics
8:00	Introduction and Objectives
8:50	Trust, Relationships and Influence: the Trust Equation, Trust Myths
9:30	Name That Firm (tabletop exercise)
9:50	Great Examples of Selling-Buying Influences (Exercise)
10:45	Break
11:10	Trust and the Buying Process; Myths about Buying and Selling
11:35	3-Level Listening to Earn the Right (breakout real-client exercise)
12:30	Lunch
PM	Crafting Trust-Based Conversations
1:30	The Trust Creation Process Model: Crafting Trust-Based Conversations
1:45	The Language of Trust (tabletop exercise)
2:05	Trust Process Exercises 1 and 2: The Staffing Problem; the Difficult Client
2:45	Applying the Trust Process in Sales: The Travel Agent; the First Meeting
3:10	Break
3:30	Handling Conflict: Name It and Claim It (exercise)
4:00	Real-client Application: Small Groups
5:10	Take-Aways for the Day
5:30	End

E. Sample One-day program, Sales Force, European Automotive Supplier

Trusted
Advisor



Trust-based
Selling

Start	Module
AM	Trust Dynamics
08:30	Expectations: What's So Hard About Customer Relationships?
08:50	Trust and Advising: Levels of Relationships
09:15	Trust Process Exercise 1: The Software Engineer
09:45	Trust, Relationships and Influence: the Trust Equation, Trust Myths
10:15	Break
10:35	Great Examples of Selling Buying Influences (Exercise)
11:20	Trust and the Buying Process; Myths about Buying and Selling
11:40	The Trust Creation Process Model: Crafting Trust-Based Conversations
11:50	Trust-based Selling: The Travel Agent; Pool Building on the Costa Brava
12:30	Lunch
PM	Trust-Based Sales Conversations
13:30	3-Level Listening to Earn the Right (breakout real-client exercise)
14:15	Buyer Types and Questioning
14:45	Trust Process Exercise 2: Selling Executive Education at London Business School
15:30	Break
15:45	Applying it All to Real Client Conversations: (breakout groups)
17:00	Take-Aways, Top 10 Actions (including wallet cards)
	Feedback
17:30	End

F. Sample Two-day Program, IT function, Pharmaceutical Company

Trusted
Advisor

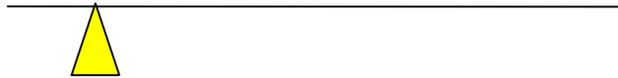


Trust-based
Selling

Start	Module
Day 1	The Dynamics of Trust
8:30	Expectations: What's So Hard About This?
9:00	Exercise and Model 1: Levels of Trust Relationships
9:45	Trust, Relationships, and Persuasion—Model 2, The Trust Equation
10:00	Trust and Persuasion: Myths about Persuasion
10:15	Break
10:35	Exercise: 3-Dimensional Listening (breakout real-partner exercise)
11:35	Model 3: The Trust Development Process: Exercise
12:15	Lunch
1:00	Great Examples of Trust, Great Examples of Buying and Selling (Exercise)
2:15	Break
2:30	Trust-Based Negotiation (3-part role-play series)
3:45	Break
4:00	The Language of Trust (tabletop exercise)
4:20	Principles Under Fire: Applying Trust to Difficult Relationship Issues
5:15	Debrief and Imprint Learnings
5:30	End
Day 2	The Practice of Trust
8:30	Trust-based Persuasion: Crafting the Conversation
9:00	The Wonderware Case (role-play exercise)
9:40	The Curious Case of Glazer Lighting
10:30	Break
10:50	Tools: Name It and Claim It—Wendy and The IBD Cases (role-plays)
11:15	The Group Trust Process Tool Kit
11:45	The e-Advantage Architecture Case (discussion)
12:30	Lunch
1:30	Applying the Trust Process in Real Conversations: (breakout groups)
3:30	Break
3:50	Trusted Advisor Self-Diagnostic
4:10	Crafting a Trust-Based Agenda: Work Groups
4:45	Debrief and Imprint Learnings
5:00	End

G. Sample Two-day Program, HR function in Global Energy Co.

Trusted
Advisor



Trust-based
Selling

Start	Module
Day 1	
AM	Trust Dynamics
9:00	Expectations and Introductions: What's So Hard About This?
9:30	Stating the Trust Problem: Live Case: the case from group, prepped night b4
10:00	Context, Core Models Review
10:25	Name That Firm (tabletop exercise)
10:25	XYZ Company Discussion Real Case #1
11:00	Break
11:15	Great Examples of Selling Buying Influences (Group exercise)
12:00	Trust and the Influence Process, including Cialdini video
12:30	Lunch
PM	Crafting Trust-Based Conversations
13:30	The Trust Creation Process Model: Crafting Trust-Based Conversations
13:45	3-Level Listening to Earn the Right (breakout real-client exercise)
14:45	Trust Values: Exercise 1, The Staffing Controversy (role-play)
15:15	Break
15:35	Trust in Action: Exercise 2, the Difficult Client (role-play)
16:15	Trust and Negotiation—role-plays
17:15	Take-Aways for the Day
17:30	End
Day 2	
AM	Managing Client Relationships
9:00	The Hostage Metaphor—video from Negotiator; material from book
9:45	Handling Conflict: Name It and Claim It—(role-play exercises)
10:45	Break
11:05	Trusted Advisor Self-Diagnostic
11:30	XYZ Company Real Discussion Case #2
12:15	Lunch
	Leading with Trust
13:15	Constructive Confrontation: Blame and Responsibility
14:00	XYZ Company Real Discussion Case #3
15:00	Break
15:20	Applying it All to Real Client Conversations: (breakout groups, role-plays)
17:10	Take-Aways, Top 10 Actions (including wallet cards)
17:30:	End

III. Module Descriptions

Following are descriptions of the modules referenced in the sample program outlines. Modules are customized to fit the industry or sector in question. I have several dozens of caselets for use in role-plays, for example, and frequently write new ones to custom-fit a new industry, sector, function, level or other problem set.

Expectations and Introductions: What's So Hard About This?

Objective: Explore with audience just what is hard about integrating trust and selling, and forming trust-based client relationships, and to show the importance of the personal. Instructor-led. Introductions include name, tenure, clients, expectations—and an interesting personal fact. In debriefing, personal facts are shown to the most memorable.

Take-Aways: *leading with trust is something we all aspire to, but in the real world a lot of things seem to work against it.. Even in technical areas, personal data is what sticks.*

Stating the Trust Problem: The Staffing Controversy

Objective: Provide an object example of how low trust shuts down a conversation and results in sub-optimal results, thus stating the business case for the value of trust.

This is a fishbowl role-play, left pretty much to the players' own devices. Discussion while the players are out of the room will highlight how the conversation might go, and how it should go. After the role-play itself, we'll discuss how low those ambitions were.

Take-Away: *Things could be a whole lot better than they usually are, if we could just figure out a way to have conversations that are more open, positive, and trust-based.*

Trust and Advising: Levels of Relationships

Objective: Suggest we operate at several levels, and it is largely up to us at which level we operate. The point is to move fluidly as the situation calls for it.

Instructor-led. 4-level model of Q&A, needs-filling, relationship, and trust.

Take-Aways: *We all relate to our clients on many levels; there is a structured way to think about this.*

Trust, Relationships and Influence: The Good, the Bad, and the Ugly

Objective: Offer basic insights into trust, relationships, and how people are influenced. How client relationships are personal. Where client relationships go wrong; the trust equation.

Take-aways: *Trust relationships are hugely powerful as influencers. Leading with content is not the only way; leading with trust improves the odds. Trust is heavily personal; credibility is not about credentials, but about being open, and about who you're trying to serve.*

Name the Firm

Objective: Show that differentiation in complex intangible businesses comes heavily from personal interaction, not solely—or even greatly—from written phrases.

Tabletop exercise. Participants are given mission statement quotes from 10 well-known firms—including the client, a few direct competitors, and extra-industry companies--and are asked to match up the quotation with the company. \$100 cash prize for anyone who gets all answers right. *Take-Aways: Buying and other forms of influence is a 2-step process—qualification and selection. Branding by advertising gets you qualified, but branding by personal interaction gets you selected. It's less about qualifications and image, and more about applied relevance. Behaving in a trustworthy manner builds the brand.*

Great Examples of Selling Buying Influence

Objective: Draw on participants' personal experiences to define and validate buyers' true motivations.

Interactive walking-around exercise. Uses buying and selling as a special case of influence. Participants identify and describe successful examples from their own experience as buyers (not as sellers) of tangible and intangible services, both positive and negative.

Take-aways: Clients value concern, reaching out and understanding over pure technical expertise.

Trust and the Influence Process: Myths about Influencing

Objective: Describe how people come to be influenced, and the role of trust therein.

Lecture. Using models of buying as a prime example of influencing, most models suffer from being overly rational. Discussion of how it really works; selling by doing.

Take-Away: That is a more realistic depiction of how I influence people.

The Trust Creation Process: Crafting Trust-Based Conversations

Objective: Learn the trust creation model and practice using the trust process model in a realistic case example of client interactions.

Explains how trust is created in conversations, and applies the trust conversation model to a customized role-play client interaction examples. One such role-play could be a discussion with a client about whom to staff on an assignment; another could be dealing with a difficult client individual with whom you have to work.

Take-Away: Now I see how that model can apply to realistic examples in my business.

The Language of Trust

Objective: Identify language, sentences and phrases appropriate for each of the five phases of the trust process.

Participants are given 40 phrases and asked to associate with the five phases of the trust process; an “answer” sheet is then handed out and discussed.

Take-Away: How to know where you are in a trust-creating conversation.

Three-Level Listening to Earn the right—Live Cases

Objective: Live-client application of step 2 in the trust creation process—listening to earn the right. .

This exercise uses live cases facing participants. Participants are asked to role-play their own clients, while their partners practice applying a three-level approach (data, context, acknowledge) to listening across two dimensions (rational and non-rational). Exercise is done in triads, so all get to play each of three roles (client, consultant, observer).

Take-Away: *I see how the drive to close gets in the way; also, I got an idea or two about how to approach my own real client tomorrow.*

Trust in Action: Exercise 2: The Difficult Client

Objective: Apply the trust process to a realistic case discussion.

Applies the trust conversation model to a case dealing with a difficult client individual with whom you have to work.

Take-Away: *Now I see how that model can apply to realistic examples in my business.*

Prisoner's Dilemma: The Principles of Relationship and Collaboration

Objective: Demonstrate the impact of the presence or absence of two key trust principles: relationship (vs. transaction) and collaboration (vs. competition)

Uses the game-theory game Prisoner's Dilemma through handing out of blinded cards; participants are asked to take an action based on a one-time event, not knowing their protagonist. Then, conditions are changed to multiple-times and knowing their partners.

Take-Away: *I see how my attitude can change business relationships, and how I can persuade others of my intentions.*

Listening and Influence: The Travel Agent

Objective: To demonstrate in a simple example the dynamics of trust in a special case of influence, that of selling. .

The case is a semi-scripted role-play. Two volunteers play the two parts, each seeing only their own script. The rest of the room sees both scripts, and can follow the dynamics between a self-oriented seller and a hard to read, but easy to understand, buyer.

Take-Away: *I can see how the model drives me to spend more time listening, and opens up more trust with the potential buyer; the biggest obstacle is my drive to come up with a solution and close, which gets in the way of the ideal sale.*

Hypothesis Generation: The Norwegian Doors Case

Objective: Show participants the value of creating hypotheses in a structured way in situations that are inherently non-structured.

The doors case consists of virtually no data, and the requirement to solve a large number of business problems. It is based on a true consulting assignment in the door industry in Norway.

Take-Away: *If you combine some structured thinking to limited data and common sense, you can create a very realistic and rich set of hypotheses to guide consulting.*

Trust-Based Negotiation

Objective: Provide an object example of the 4 Trust Principles; show how trust can transform a classically difficult business conversation.

This exercise uses three simple scripted role-plays. The first two map out the traditional Getting to Yes negotiation methodology, and describe win-win behaviors at negotiation. The third shows how to move beyond even Getting to Yes via the application of trust principles. The combination demonstrates all four Principles of trust.

Narrative in Trust Creation--Exercise

Objective: Demonstrate how story-telling can build trust.

This is a full-group exercise. Group begins in a circle; instructor tells a 90-second slice of reality story as a demo; 6 others then tell their own stories. Emphasis is put on increasing authenticity by use of certain techniques. After discussing techniques for improving stories, the selected stories are then linked to specific business issues to demonstrate their business value.

Take-Away: *There are simple techniques to improve the effectiveness of stories, testimonials, and vignettes—and they help build trust.*

Handling Conflict: Name It and Claim It

Objective: Practice applying perhaps the most powerful trust-enhancing tool.

This exercise uses scripted role-play caselets to test the Name It and Claim It trust tool. Role-plays initially involve two volunteers, but then other audience members are brought into to build on and expand the role-play.

Take-Away: *It is actually possible to speak the hard truths, handle difficult conversations—and actually increase, not decrease, trust by doing it.*

The Trusted Advisor Self-Diagnostic

Objective: Show that you have to customize at the individual level to create trust; give some ideas about how to be trusted.

This is a tabletop exercise, filling out a two-page rate-yourself questionnaire. The results (blinded) are summarized, and compared to other participants' results. However, the conclusions are that scores don't matter nearly as much as the application.

Take-Away: *Trust has to be based on my personal interactions with the particular client; all rules have to be taken with a grain of salt, because they generalize.*

Follow the Dog: Accepting the Client's Reality

Objective: Give participants practice in being non-judgmental.

This exercise is based on exercises in improvisational comedy. It asks participants in duos to make up stories, each building on the other, at an increasingly rapid pace. Each person must accept, understand and affirm the other's last statement, then add something further.

Take-Away: *I can really come to understand someone if I suspend my tendency to judge for a time.*

The Values of Trust: Creating an Environment for Trust, and Applying Principles to Problems

Objective: To show the power of rigorous application of values to classic client problems, thereby showing how to increase trust in an organization.

Four values are articulated (long-term perspective; client focus; transparency; collaboration). Several classic consultative problems are outlined: referring to an outsider, scope creep, price-cutting, gate-keeper clients. In groups of 5, teams discuss how to rigorously deduce answers to these dilemmas from the values.

Take-Away: *Values are valuable guides to resolving conflicts; these particular values seem to work very well.*

The Hostage Metaphor

Objective: Use hostage metaphor to reinforce range of personal freedom and responsibility; related to the Blame and Responsibility module.

This exercise uses video from the movie *The Negotiator*, and from George Kohlrieser's book *Hostage at the Table* to show how we create our own hostage situations in relationships, and have the freedom to jump free of them.

Take-Away: *There is really very little that I am forced into by others; I nearly always have constructive options, if I can manage my own feelings and see desired outcomes.*

Blame and Responsibility

Objective: Make participants adept at recognizing instances of and consequences of people not taking responsibility for themselves, their actions, and their emotions.

Participants take turns reading aloud, in front of the room, seven stories (from business magazines, newspapers) that profile profound responses—positive and negative—to life and business situations. Instructor leads discussion. Group evolves actionable approaches to the concepts of responsibility, blame, apology, and when to use—and not use—each.

Take-Away: *The issue is to see things as they are, and to take appropriate action—not to get lost, or accept others getting lost, in blaming or over-apologizing.*

Real Client Sales Conversations: Small Group Role-Plays

Objective: Apply the trust process to “live” client situations.

In groups of four, participants discuss each person's real-life client situation in turn, so that three participants play “consultant” to the fourth, recommending specific actions and conversations with the client using the material discussed in the session. Each person's section will end with a role-play

Take-Away: *This crafting of conversations is practical and real, and can result in different approaches and powerful results. Now I know what I'm really going to say when I have to call on Joe next week.*

Live, No Safety Net: The Meeting on the Airplane, and debrief

Objective: Live demo of relationship-building skills in a realistic situation.

Instructor will meet, for the first time, a Shell HR executive. The situation will be an airplane ride, where the two parties are seated next to each other. Playing themselves, the

instructor will develop a half-hour discussion with the executive. Afterwards, the group will discuss how well the relationship building went, lessons learned, and opportunities to use skills.

Take-Away: These skills are applicable and relevant in a startlingly realistic setting.

Take-Aways from Group

Objective: to make the learnings memorable; to make actionable follow-up steps.

This discussion uses public imprinting (attendees state what is memorable, I write it down on PowerPoint in real time—oral, aural, visual reinforcement).

Take-Aways: These are the themes and ideas we all agreed are most valuable to us.

Top Ten High-Impact List

Charles Green's own "top ten" list. A mixture of strategic and tactical, things that have the highest impact return on investment. Includes handout hard plastic wallet card with trust equation, trust creation model, Trust Values List, Top Ten list and website link to articles.