



# Customer Success Series Sandler Training by Coffman Group

# Supportive Mindset and Beliefs

---

## OVERVIEW

This workshop is designed to help participants identify the self-limiting beliefs that contribute to a less confident and positive mindset, impacting their ability to provide a customer with the best possible service experience.

Participants are given the tools to identify these subconscious beliefs and reframe to be more positive and productive.

This puts them in a healthy mindset of equal business stature and gives them the confidence to be true advisors and problem solvers with their customers.

# Engaging Across the Organization

---

## OVERVIEW

This workshop is designed to help participants identify additional contacts higher in an organization and gain access to those individual.

Participants are introduced to the idea of Equal Business Stature to give them the mindset needed to interact with high-level contacts.

They learn tools to ask for and receive introductions to key contacts. Additionally, they learn how to ask the right kinds of questions that engage the high-level contacts and add value to the conversation.

# Conducting Successful Meetings

---

## OVERVIEW

In this workshop participants learn what an Up-Front Contract is, why it's important, and how to create them.

This gives them the tools to conduct more effective and productive meetings by having a clear purpose, agenda, and outcome in order to make the most of the customer's time as well as their own.

They learn the five components of an Up-Front Contract and have the opportunity to create and practice delivering their own.

# Effective Questioning Strategies

---

## OVERVIEW

In this session participants learn two specific questioning strategies – Reverse and Negative Reverse.

These strategies help CSMs get a deeper understanding of a customer's needs, concerns, and challenges, which allows the CSM to provide a better response and/or solution.

Participants learn the value of spending more time gathering information vs. giving information, which strengthens the relationship and bond with the customer.

# Working through Challenging Situations

---

## OVERVIEW

In this session participants learn how to work through challenging situations by focusing on the psychology of how people respond in difficult situations, and how to manage them more effectively.

The key theme is that each challenging situation or person provides an opportunity to learn, grow, and serve.

# Surfacing Potential Opportunities

---

## OVERVIEW

This session teaches CSMs to surface new opportunities by learning to listen for and ask about the customer's pain. Participants learn how pain is the greatest motivator for change.

They learn how to attune themselves to listening for and asking about pain indicators to understand where their products and services may be able to help.

By helping customer's to be more proactive about addressing pain points, CSMs become a more valuable resource to the customer, solidifying the customer's relationship with the organization.

# Renewal Expansion and Upgrade

---

## OVERVIEW

This session builds on the previous session where we surfaced potential opportunities by looking for pain indicators. Here we ask further questions about the pain indicators to develop the need for renewal, expansion, or to upgrade.

CSMs learn the types of questions to ask to create a collaborative dialog to expand a customer's awareness of potential opportunities to improve their business outcomes.



# Conducting Value-Based Conversations

---

## OVERVIEW

This session provides participants two tools to help them prepare for and conduct value-based conversations with their customers. The first tool is the Client-Centric Satisfaction Tool, which has two parts – Initiating and Rating.

The second tool is a Pre-Call Planning tool. Both tools help CSMs to engage customers in conversations that deepen the relationship and the customer's overall satisfaction, creating loyalty and continued business.