SKILLSET

powered by Trustworthy Selling

Content Sample Package

Content Sample Note:

Throughout this package you will see notes in a box similar to this. These notes provide you with guidance and instruction on how our materials for the SkillSet program are arranged and organized.

The hyperlinks and QR Codes in this guide are not active. In a few areas you will see a note like this alerting you to an active hyperlink or QR Code to view content outside of this package.

Table of Content

SKILLSET

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Facilitator Guide

Collaborative Discovery

Module at a Glance

Collaborative Discovery

This module on *Collaborative Discovery* is the cornerstone of the Trustworthy Selling approach. The collaborative discovery process is where the sale is typically made, and we help participants understand the benefits of engaging in courageous conversations with prospects and clients. We begin by focusing on consumer preoccupation and the value of good listening skills, then we explore the art and science of questioning to understand more clearly the buyer's need. We introduce participants to the RPM Questioning Model™ to help them dig more deeply and develop more meaningful relationships. The RPM provides financial professionals with a process to increase the sense of urgency and gain agreement to move forward.

Special Advance Preparation Instructions

- **RPM Questioning Method Card Sort Activity**. You will need to make copies of the answer key located at the back of this section for this activity. Be sure to have enough copies to distribute to each group. Additional facilitation notes on the RPM Questioning Model are provided at the end of this section. Read through these to help field any questions that arise as a result of this activity.
- Obtain a copy of the **Discovery Document or Company Fact Finder** used by participants in your class. Identify in advance if each question on it is a reality, pain/gain, or a magnification question (in particular the life insurance and retirement planning sections).

Module Flow

Introduction to Collaborative Discovery	
• Opening Discussion	3 minutes
• Video — Introduction to Collaborative Discovery	4 minutes 44 seconds
• Debrief Discussion	2 minutes
Segment Total	**10 minutes**

Trustworthy Selling Listening	
• Opening Discussion	3 minutes
• Video — Active Listening	3 minutes 46 seconds
• Debrief Discussion and Listening Skills Assessment	8 minutes
• Group Activity — Listening Skills Assessment	10 minutes
• Video — Leverage the Power of Silence & Limit Self-disclosure	4 minutes 54 seconds
• Debrief Discussion	3 minutes
• Video — Nonverbal Communication & Avoiding Judgment	5 minutes 15 seconds
• Group Activity — Nonverbal Clues	10 minutes
• Video — The Power of Paraphrasing	4 minutes 11 seconds
• Debrief Discussion	3 minutes
• Conclusion of Segment	1 minute
Segment Total	**56 minutes**

The Art and Science of Questioning	
• Opening Discussion	3 minutes
• Video — Diagnose Before You Prescribe	4 minutes 44 seconds
• Debrief Discussion	8 minutes
• Video — Levels of Buyer Need	6 minutes 48 seconds
• Debrief Discussion	5 minutes
• Video — The RPM Questioning Model	14 minutes 13 seconds
• Debrief Discussion	2 minutes
• Group Activity — RPM Questioning Method Card Sort And Debrief	15 minutes
• Conclusion of Segment	2 minutes
Segment Total	**1 hour, 1 minute**

Creating a Sense of Urgency	
• Opening Discussion	3 minutes
• Video — Creating a Sense of Urgency	3 minutes 23 seconds
• Group Activity - Discovery Document RPM Questions Review/ Sharing Effective RPM Questions (TWO OPTIONS)	15 minutes
• Video — Collaborative Commitment	8 minutes 42 seconds
• Debrief Discussion and Group Activity – Collaborative Commitment Role-Play	15 minutes
• Video — Advances Versus Stalls	6 minutes 45 seconds
• Debrief Discussion	3 minutes
• Group Activity — Stalls and Advances — Worksheet and Debrief	5 minutes
• Closing and Action Planning	5 minutes
Segment Total	**1 hour 5 minutes**

Module total = 3 hours, 5 minutes

Video Segments

Introduction to Collaborative Discovery (George Ludwig) 4:44 minutes

1. Active Listening 3:46 minutes
   - Leverage the Power of Silence & Limit Self-disclosure 4:54 minutes
   - Nonverbal Communication & Avoiding Judgment 5:15 minutes
   - The Power of Paraphrasing 4:11 minutes
2. Diagnose Before You Prescribe 4:44 minutes
   - Levels of Buyer Need (George Ludwig) 6:48 minutes
   - The RPM Questioning Model (George Ludwig) 14:13 minutes
3. Creating a Sense of Urgency (Joey Davenport) 3:23 minutes
   - Collaborative Commitment (Miguel Taveras) 8:42 minutes
   - Advance vs. Stalls (Miguel Taveras) 6:45 minutes

Content Sample Note:

The Subject Matter Expertise taught in the SkillSet program resides via online video delivered through the tsprogram website.

To view a sampling of the video content, click hyperlinked videos to the left.

Note: These videos are hosted on YouTube for easy viewing. These videos are edited from their full version.

Learner Outcomes

- Use *Trustworthy Listening* skills to deepen the relationship, break preoccupation, and help prospects to share more freely.
- Master the art of questioning while equipping participants with the RPM Questioning model designed to align actions with intentions.
- Engage in courageous, caring conversations through magnification questions, while testing for alignment during the process.

Activities or Exercises

- ***Listening Skills Assessment*** — participants complete a self-assessment focused on how well they use active listening skills. Once the assessment has been completed and scored, participants work in pairs discussing their results and identifying strategies to become more effective at active listening.
- ***RPM Questioning Method Card Sort*** — participants identify each question shown on the cards in their decks as being a *reality, pain/gain, or magnification* question.
- ***Discovery Document RPM Questions Review/Sharing Effective RPM Questions (TWO OPTIONS)*** — participants identify pain/gain and magnifying questions in their company's fact finder OR come up with questions and their appropriate companion pre or post questions.
- ***Collaborative Commitment Role-Play*** — simulating a discovery meeting, participants role-play the Collaborative Commitment process with their partners based on the facts in given role-play scenarios.
- ***Stalls and Advances Worksheet*** — participants identify whether a statement from a prospect is a stall or an advance.

Introduction to Collaborative Discovery

Content Sample Note:

We provide fully scripted Facilitator Guides that lead your facilitators/sales leaders, word for word through how to tee up content, debrief content, lead group discussions, and run adult learning activities.

The next couple of pages are an example of our Facilitator Guide content.

Opening Discussion
3 minutes

WELCOME participants to SkillSet Powered by Trustwor
Collaborative Discovery.

ASK participants	
QS	
• **Who can share an example of their Strategies to Test and what you need to do in order to test this strategy in your practice?**	• **Who can sh of their Stra and what th may be if yo strategy int**

ALLOW two or three (2–3) participants to share their learnings. If no one volunteers, call on individuals directly.

EXPLAIN:

- Once you've effectively engage a prospect and piqued his or her interest, the next step is to transition to the discovery process.

ASK participants:

- **When I say the term "fact-finding," what's one word to describe what comes to mind for you?**

Flipchart

FLIPCHART *responses as participants contribute.*

RESPONSES *MAY* INCLUDE:

- Interview
- Questioning
- Listening
- Asking
- Forms
- Information

NOTE: *There aren't necessarily any wrong answers.*

EXPLAIN: All of those answers are certainly aspects of the fact-finding or the discovery process, but as you can see most of them are centered on the process — and not the information you would hope to gain.

<table>
<tr>
<td>Video —
Introduction to Collaborative Discovery
4:44 minutes

Participant Guide Page 2</td>
<td>INTRODUCE VIDEO:

The first video discusses the importance of the collaborative discovery process as a means to demonstrating benevolence through your commitment to learning as much about a prospect or client as possible.
Today’s most successful sales professionals understand that it is important to keep “serving” as the focal point as we enter the most important phase of the sales process.

DIRECT participants to turn to page 2 in the participant guide and take notes as appropriate during the video.

SHOW the video:

Introduction to Collaborative Discovery

STOP the video.</td>
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<tr>
<td>Debrief Discussion
5 minutes

Flipchart</td>
<td>ASK participants:

What are some ways that collaborative discovery differs from traditional fact-finding?

RESPONSES SHOULD INCLUDE (Make comparison to original responses on flipchart):

Asking spot-on intelligent question, you’ll be able to reduce tension, build on credibility, and uncover pain-gain gaps.
Collaborative discovery will help to align prospects’ actions with their intentions.
Collaborative discovery is what you do with a prospect; fact finding is what you do to a prospect.
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<td></td>
<td>INFORM participants of the Collaborative Discovery infographic they can link to on the website. They should see the link in their participant guides.

EXPLAIN: Let’s get started with what we can do to create an environment where you and your prospect can have a meaningful conversation.</td>
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Trustworthy Selling Listening

Opening Discussion **3 minutes**	**ASK** participants: • **How do you feel when you are speaking with someone and you recognize that they really aren't listening? Describe how that feels?** • **What would your client or prospect see or hear that tells them you are truly listening?** *(Responses may include: good eye-contact; taking notes; nodding their heads.)* • **How many of you think you are good listeners?** • ASK participants who responded positively to the last question: **Do you think the people you know or work with would also describe you as a good listener?** **EXPLAIN:** We will have the opportunity to learn more about active listening in the next video and then take a self-assessment to reflect upon how well we actually do listen.
Video — Active Listening **3:46 minutes** ***Participant Guide Page 3***	**INTRODUCE VIDEO and EXPLAIN:** • Active listening is an important skill to possess. • In this video you will hear about how listening, I mean really listening, can bring additional benefits to your engagement with your prospects and clients. **DIRECT** participants to turn to page 3 in their participant guide and take notes as appropriate during the video. **SHOW** the video: • **Active Listening** **STOP** the video.
Debrief Discussion and Listening Skills Assessment **8 minutes**	**ASK** participants: • **What is the principle of reciprocity discussed in the video?** • **How does it relate to listening?**

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Participant Guide Page 4

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INFORM participants of the *Voltaire/James/Covey Quote* infographic they can link to on the website. They should see the link in their participant guides.

EXPLAIN: You will now have a chance to evaluate your own ability to use active listening skills.

NOTE: *The purpose of this activity is for participants to analyze their current active listening skills and identify strategies to become more effective listeners.*

DIRECT participants to the *Active Listening Skills Assessment* on page 4 in their participant guides. Review the instructions on the top of the assessment.

ALLOW five (5) minutes for this exercise.

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Group Activity — Listening Skills Assessment
10 minutes

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INSTRUCT participants to work in pairs, preferably with new partners. Have them spend time discussing their strengths and areas for development, based on the results of their *Active Listening Assessment*.

ALLOW five (5) minutes for paired discussions.

ASK participants:

- **Who will share a key strength and an area they need to develop, based on their assessments?** *(Note: attempt to get at least two areas for development.)*

EXPLAIN:

- You should now see just how important it is to have finely tuned listening skills. And, as the video suggested, *Trustworthy Listening* is so important we've defined it as its very own process — complete with the best practices we discussed a few minutes ago.
- To take this assessment to the next level and truly understand your strengths and opportunities as a listener, you need feedback from others. Consider using this assessment with your staff, family, or others with whom you interact on a regular basis to determine how they evaluate your listening skills.

ASK participants:

- **As studies have shown, because the average rate at which we listen is so much greater than the rate at which we speak, what do we often find ourselves doing while others are speaking?** *(Listen for: our minds are wandering; we are thinking about what to say next; we are looking around the room…)*

INSTRUCT participants to make a date on their cell phones to retake this *Active Listening Skills Assessment* 30 days from now and reassess their areas for improvement.

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	EXPLAIN: Let's move on to the next video where we can learn about techniques to keep our minds from wandering during the conversation when others are speaking.
Video — Leverage the Power of Silence & Limit Self-disclosure 4:54 minutes ***Participant Guide Page 6***	**INTRODUCE VIDEO:** • We've all heard it before, sales people talk too much and listen too little. • In this video, we will learn about the 70/30 rule and how to appropriately apply techniques to get your prospects and clients talking in order to improve communication. **DIRECT** participants to turn to page 6 in their participant guide and take notes as appropriate during the video. **SHOW** the video: • **Leverage the Power of Silence and Limit Self-disclosure** **STOP** the video.
Debrief Discussion 3 minutes	**ASK** participants: • **Who can tell me about golden silence?** **RESPONSES SHOULD INCLUDE:** • A simple pause for three or four seconds at two key places in the dialogue. • Pause after you ask a question and the prospect responds. • Give the prospect more time to reflect and respond to questions with solid information, and they may elaborate further. **ASK participants:** • **What is the key, mentioned in the video, about using the golden silence technique?** **RESPONSES SHOULD INCLUDE:** • Do not break eye contact. • Do not look down at your notes or questionnaire. • Pause and look expectantly at the prospect or client as if you're assuming he or she is going to elaborate. **ASK participants:** • **What does it mean to limit self-disclosure?**

	RESPONSES SHOULD INCLUDE: • Don't talk about yourself. • The conversation should be about the prospect or client. **ASK** participants: • **Who can give me an example of how he or she would limit self-disclosure?** **LISTEN** *to responses and inject insights as appropriate.* **EXPLAIN:** As we know, not all communication happens verbally. What do we do with the messages we are receiving non-verbally? Well, our next video will show us some things we need to be aware of to ensure we're not delivering the wrong messages.
Video — Nonverbal Communication & Avoiding Judgment **5:15 minutes** ***Participant Guide Page 7***	**INTRODUCE VIDEO and EXPLAIN:** • Nonverbal communication is about more than just our body language. • Let's learn about what makes up 93 percent of how we communicate. **DIRECT** participants to turn to page 7 in the participant guide and take notes as appropriate during the video. **SHOW** the video: • **Nonverbal Communication and Avoiding Judgment** **STOP** the video.
Group Activity — Nonverbal Clues **10 minutes** ***Participant Guide Page 8***	**NOTE:** *This activity is designed to bring awareness to participants on the different nonverbal clues they may be sending and receiving and what they mean.* **EXPLAIN:** Many of us are familiar with the interpretation of individuals folding their arms or legs. It essentially means they're "closing themselves off" to what you have to say. But there are other widely demonstrated behaviors that also have proven meanings. **DIRECT** participants to the *Understanding Nonverbal Cues Exercise* worksheet on page 8 in the participant guide. Take a few minutes to read the instructions and complete the exercise in your table teams.

ALLOW five to seven (5–7) minutes for teams to complete the exercise and then share the correct responses with them.

The **CORRECT** responses are:

	Behaviors (Cues)	Meaning
E	Steeple Fingers	A. No longer listening
F	Cross-arms across chest	B. Willingness to listen; contemplative
G	Rub or touch nose with finger	C. Wants to interrupt
A	Shift posture away from speaker	D. Frustrated
H	Puts hand over mouth	E. Extreme confidence; Superiority
D	Rubs back of neck	F. Defensive feelings
B	Chin in palm / finger along cheek	G. Disapproval
C	Tugging ear	H. Hesitant to speak

NOTE: *The interpretations are from Dr. Karen Lawson's book called, "50 Communication Skills Activities." (Karen Lawson, Ph.D., CSP — Lawson Consulting Group, Inc.)*

ASK participants:

- **As you were completing the worksheet, how did your team arrive at the meaning you assigned to particular behaviors?**
- **How does understanding and reacting to body language affect your prospects' and clients' perceptions of how "trustworthy" you may be?**
- **What did you learn from this activity, and how can this information help you in your future interactions?**

EXPLAIN: In addition to picking up on the nonverbal cues your prospects and clients are sending, what else can you do to confirm your understanding of the messages they are delivering? Let's find out about the power of paraphrasing in our next video.

Video — The Power of Paraphrasing 4:11 minutes

INTRODUCE VIDEO and EXPLAIN:

- We put the "Power of Paraphrasing" practices within the *Trustworthy Selling Listening* segment to help you adopt skills that will truly let your prospects and clients know … you are listening!
- Let's learn about techniques we can use to convey this message clearly to our consumers.

Participant Guide Page 9

DIRECT participants to turn to page 9 in the participant guide and take notes as appropriate during the video.

SHOW the video:

- **The Power of Paraphrasing**

STOP the video.

Debrief Discussion 3 minutes

ASK participants:
- **What is the power of paraphrasing?**

RESPONSES SHOULD INCLUDE:
- Restating in your own words what the prospect has articulated to you.
- To distill the meaning of what you heard and repeat back to the prospect in a way that shows you've internalized it and made it your own.
- Used at critical points during the discovery process — throughout and at the conclusion.
- Paraphrase reiterates and helps to solidify key points articulated by the prospects and reinforces their thought processes.

ASK participants:
- **What is the process of paraphrasing?**

RESPONSES SHOULD INCLUDE:
- Pay attention — take notes. Make it a practice to jot down notes on your discovery questionnaire. Underline, circle, and asterisk key points as you go, especially some of the key emotional phrases a prospect might share during conversation.
- Create a narrative using the key points. Connect the dots. Review the key points you highlighted and connect them. This will help you get through the smoke and mirrors to the heart of what really matters.
- Verbalize. Don't just repeat what the prospect said (which is known as parroting), but use your own words. This should come naturally if you've followed the first two steps.

ASK participants:
- **What language does the video suggest you use to interject a paraphrase of what you've heard?**

RESPONSES SHOULD INCLUDE:
- "Let me recap my understanding…"
- "If I understand you correctly, you feel…"
- "What I hear you saying is…"

INFORM participants of the *Power of Paraphrasing* infographic they can link to on the website. They should see the link in the participant guide.

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EXPLAIN: We have learned a lot of techniques in this segment of Collaborative Discovery. Let’s review….
ASK participants:

What were the other best practices of Trustworthy Selling Listening that we have discussed?

RESPONSES SHOULD INCLUDE:

Leverage the power of silence
Limit self-disclosure
Nonverbal communication
Be non-judgmental
The power of paraphrasing

ASK participants:

Who can describe what each means? (Call on multiple volunteers.)

RESPONSES SHOULD INCLUDE:

Leverage the power of silence — Pause for three or four seconds at two key places in the dialogue — after you ask a question and after your customer responds.
Limit self-disclosure — The conversation should be all about the prospect.
Nonverbal communication — Recognize eye contact, body posture, gestures, facial expressions and vocal tone.
Be non-judgmental — Avoid subtle cues like the raising of an eyebrow or an “hmmm.” Don’t push back in areas that you feel are important, but aren’t important to the client.
The power of paraphrasing — Don’t “parrot” what the prospect or client has said; verbalize it back to them in your own words to check for understanding.

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<td>Conclusion of Segment</td>
<td>
ASK for any questions before you wrap up the segment.
EXPLAIN: Listening is key in the Trustworthy Selling approach, but you can only listen if you get the client to talk. The next segment will provide you with strategies to quickly make the connections that build relationships for life.
INFORM participants of the Poor Listener vs. Good Listener infographic they can link to on the website. They should see the link in their participant guides.
NOTE: Take whatever break may be appropriate before beginning next segment of the module.
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The Art and Science of Questioning

Discussion **3 minutes** **Flipchart**	**EXPLAIN:** Although listening is important, like we said earlier, you have to have someone to listen to! So collaborative discovery starts with asking good questions. And while we might think that most sales professionals are GREAT at asking questions, the fact is, it's an area where many can use some real help. **ASK** participants: • **What are some of the most common mistakes you think financial professionals make relative to asking questions?** **FLIPCHART** *responses as participants contribute. (There are no wrong answers here — just elicit responses from the participants.)* **RESPONSES MAY INCLUDE:** • Don't ask enough questions. • Don't ask the right questions. • Jump to conclusions. • Don't listen carefully to answers. **EXPLAIN:** We will return to these responses later in the session.
Video — **Diagnose Before You Prescribe** **4:44 minutes** ***Participant Guide Page 10***	**INTRODUCE VIDEO** • Our next video will bring to light the connection we, as financial professionals, have to being a competent medical doctor. • Understanding how the two roles are similar when working with our clients will put into perspective the importance of conducting an effective collaborative discovery. **DIRECT** participants to turn to page 10 in the participant guide and take notes as appropriate during the video. **SHOW** the video: • **Diagnose Before You Prescribe** **STOP** the video.
Debrief **Discussion** **8 minutes**	**EXPLAIN:** The video used the term "Doctor of Selling" to depict the idea that just as a doctor needs to find out about a person's history, so do we as trustworthy sales professionals.

ASK participants:

- **What else makes our job as financial professionals similar to that of a doctor?**

RESPONSES SHOULD INCLUDE:

- We have to ask a lot of questions.
- We have to listen for the spoken and the unspoken messages/responses.
- We have to earn the trust of our clients (patients) before they'll take our advice.
- We have to diagnose fully before we can prescribe a solution.
- We make recommendations only after we have all the facts.

ASK participants:

- **The video compared our selling style to the demeanor of a doctor with a great bedside manner. What are some the adjectives used to describe the similarity between our roles?**

RESPONSES SHOULD INCLUDE:

- Assuring
- Confident
- Competent
- Patient
- Thorough
- Deliberate
- Trustworthy

Flipchart

FLIPCHART *responses as participants contribute.*

ASK participants:

- **How many of you feel confident your network, prospects, or clients would use some or all of these adjectives to describe you?**
- **I would like to challenge each one of you — which one or two adjectives noted here do you feel you can improve upon?** *Ask participants to make note of them and discuss with their coaches ways they can improve.*

ASK participants:

- **What were the subtle ways mentioned in the video that may demonstrate we are prescribing before diagnosing?**

RESPONSES MAY INCLUDE:

- When you say to prospects, "You need" or, "You should," without making them feel understood.
- Talking about our products prematurely.
- Talking about our services prematurely.

	ASK participants: • **What four important functions does a thorough diagnosis serve?** **RESPONSES SHOULD INCLUDE:** • Uncovers the prospect's real pain and desire for gain. • Prompts prospects to identify and acknowledge their pain and desire for gain. • Prompts the prospect to want to close the pain-gain gap. • Creates a sense of urgency. • Collaboratively involves the prospect in the process, reducing tension, expanding the relationship, building credibility, and fostering trust-building. **ASK participants:** • **What are the two critical skills to successfully diagnose before you prescribe?** *(Responses include: ask great questions and actively listen.)* **INFORM** participants of the *Thorough Diagnosis* infographic they can link to on the website. They should see the link in their participant guides. **EXPLAIN:** Now that we have explored how important it is to conduct an effective discovery, let's look at the levels of need your prospects may be experiencing.
Video — Levels of Buyer Need 6:48 minutes ***Participant Guide Page 11***	**INTRODUCE VIDEO** • Our next video will introduce us to the four levels of buyer need. **DIRECT** participants to turn to page 11 in the participant guide and take notes as appropriate during the video. **SHOW** the video: • **Levels of Buyer Need** **STOP** the video.
Debrief Discussion 5 minutes	**ASK** participants: • **Who can explain what each of the four levels of buyer needs mean?** **RESPONSES SHOULD INCLUDE:** 1. **No Need** — the prospect isn't likely ever to realistically do business based on finances, health, etc. 2. **Dormant Need** — the prospect doesn't see the need due to current circumstances, but a need *does* exist. 3. **Visible Need** — the prospect sees the need, but may need help in seeing your solution as the best one. 4. **See <u>Your</u> Solution** — the prospect sees the need and sees your solution as the right one.

SKILLSET

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Participant Guide

Collaborative Discovery

Module Introduction

Introduction to Collaborative Discovery

Content Sample Note:

Our Participant Guides are delivered through our tsprogram website and are best used in their digital format. Doing this saves you the expense of printing materials, and providing ease to your participants in remote locations to easily access our content.

Our guides provide your participants with access to our SME video content, tools, resources, and eLearning Knowledge checks through hyperlinks and QR Codes. Plus our guides come with fillable fields so your participants can take notes about what they hear in the video content and shared during group discussions.

Note: the hyperlinks and QR Codes in this section of the package are not active.

Collaborative D
philosophy t
intelligent que
reduce tensio
you establis
phase, unco
client's pain
importantly, ali
with his

Notes:

Content Sample Note:

This is a fillable field. Try typing in this Notes: section!

"Collaborative Discovery" is something you do **WITH** your prospect;

fact finding is something you do **TO** your prospect.

Get the Collaborative Discovery infographic

Segment: Trustworthy Selling Listening

Active Listening

Listening is a fundamental building block in making a connection with prospects and clients. It demonstrates your benevolence and your interest in hearing about the prospect and tailoring your process to his or her needs.

Notes:

Benefits of Trustworthy Listening™

- Helps to make a connection
- Reduces stress
- Reduces meeting time
- Touches the Principle of Reciprocity — give first so you may receive later
- Makes “deposits into someone’s emotional bank account"

Get the Voltaire/James/Covey infographic

Active Listening Skills Assessment

Directions: Look at the **Listening Skills Assessment** below. Think about your on
on the job and in your personal life. Check the box that corresponds to that behav
your numbers together and use the scale at the bottom to determine what kind of

Content Sample Note:

Take the Active Listening Skills Assessment for yourself! How did you do?

	ALMOST ALWAYS	OFTEN	SOMETIMES	SELDOM	NEVER
1. I maintain good eye contact when talking to a prospect.					
2. I allow the prospect to finish talking without interrupting.					
3. I give the prospect my complete attention without engaging in any other activities.					
4. I paraphrase what the prospect has said to make sure I am clear on what he/she is saying.					
5. I concentrate on the prospect's points, even if I am not interested.					
6. I refrain from forming rebuttals in my head while the prospect talks.					
7. I ask the prospect open-ended questions to clarify my understanding of his/her message.					
8. I refrain from daydreaming or thinking of other things while the prospect talks.					
9. I use nonverbal cues, such as head nodding, to encourage the prospect to continue.					
10. I "tune out" distractions when listening to the prospect.					
11. I take notes to help me remember key points during the conversation.					
12. I do not overreact to a prospect's emotionally charged words.					
13. I listen for the prospect's main message or theme during the conversation.					
14. I pay attention to the prospect's nonverbal cues that may contradict his/her message.					
15. I listen for tone and feeling in addition to facts.					
16. I concentrate on the prospect's message and not on his/her appearance or mannerisms.					
17. I confi rm my perception of the prospect's feelings by acknowledging the emotion he/she may be experiencing.					
18. I think about how the prospect may react to what I say before I speak.					
19. I summarize the prospect's main points at the end of the conversation.					
20. I use interjections (uh-huh, go on, tell me more) for additional contribution.					
TALLY TOTALS	5 POINTS EACH	4 POINTS EACH	3 POINTS EACH	2 POINTS EACH	1 POINT EACH
HOW WELL DO YOU LISTEN (GRAND TOTAL)					

100-92 = ACTIVELY | 91-75 = DEVELOPING | 74-46 = INCONSISTENTLY | 45-29 = SURVIVING | 28-20 = BARELY, IF AT ALL

Group Activity: Listening Skills Assessment

Directions: Working in teams of two, spend time discussing your strengths and areas for development, based on the results of your **Active Listening Assessment**. Note your findings below.

Notes:

Characteristics of a Poor Listener	Characteristics of a Good Listener
• Always interrupts • Jumps to conclusions • Changes the subject • Finishes other people's sentences • Gives no response • Is inattentive, has wandering eyes and poor posture	• Looks at you and is engaged • Asks questions to clarify what you're saying • Does not rush you • Does not interrupt you • Keeps on the subject until you finish your thought • Responds with head nodding, a smile or frown

Segment: Trustworthy Selling Listening

Leverage the Power of Silence & Limit Self-disclosure

Golden Silence:

Pause for three or four seconds at **two key** places during the dialogue with the prospect.

1. After you ask a question.
2. After the prospect responds.

Top financial professionals practice the **70/30 rule**.

Listen **70 percent** of the time.

Speak **30 percent** of the time.

Notes:

Top producers understand that people don't care how much you know, until they know how much you care....

Nonverbal Communication & Avoiding Judgment

The Words We Speak:

____

Vocal Tonality:

____

Body Language:

____

Vocal Tonality & Body Language Account for:

____

of ALL communication!

Notes:

Segment: Trustworthy Selling Listening

Group Activity: Nonverbal Clues

Directions: Review the two columns below. To the left of each behavior, place the letter of the "meaning" you would assign to the particular behavior.

Behaviors (Cues)	Meaning
_____ Steeple Fingers	A. No longer listening
_____ Cross-arms across chest	B. Willingness to listen; contemplative
_____ Rub or touch nose with finger	C. Wants to interrupt
_____ Shift posture away from speaker	D. Frustrated
_____ Puts hand over mouth	E. Extreme confidence; Superiority
_____ Rubs back of neck	F. Defensive feelings
_____ Chin in palm / finger along cheek	G. Disapproval
_____ Tugging ear	H. Hesitant to speak

NOTE: *This activity is adapted from "50 Communication Skills Activities."*
Karen Lawson, Ph.D., CSP — Lawson Consulting Group, Inc

REMEMBER!

93 percent of all
communication is non-verbal

Segment: Trustworthy Selling Listening

The Power of Paraphrasing

Notes:

Paraphrasing Language:

- "Let me recap my understanding…."
- "If I understand you correctly, you feel…."
- "What I hear you saying is...."

The Process of Paraphrasing

1. **Pay attention — take notes:** Make it a practice to jot down notes on your discovery document or questionnaire. Underline, circle, and asterisk key points as you go. Take special note of the key emotional phrases a prospect might state during the conversation.
2. **Create a narrative using the key points:** Connect the dots. Review the key points you highlighted and connect them. What is your prospect telling you? Sometimes, you'll be able to cut through minutes of smoke and mirrors and get right to the heart of the matter.
3. **Verbalize:** Don't just repeat what the prospect said (also known as "parroting"), but use your own words. This should come naturally if you've followed the first two steps.

Get the Power of Paraphrasing infographic.

Get the Poor Listener vs. Good Listener infographic.

Diagnose Before You Prescribe

Top financial professionals have a selling style and demeanor very similar to a doctor who has great bedside manner … assuring, confident, competent, patient, thorough, deliberate, and of course trustworthy.

Notes:

Every time you say, "You need…," you are prescribing

Diagnosis Serves Four Functions:

1. Uncovers the prospect's real pain and desire for gain.
2. Prompts the prospect to acknowledge pain/desire for gain.
3. Prompts the prospect to want to close the pain/gain gap with a sense of urgency.
4. Collaboratively involves the prospect in the discovery process — reducing tension, expanding the relationship, building credibility, fostering trust.

Get the Thorough Diagnosis infographic

Levels of Buyer Need

Prospects buy **only when** they perceive gaps or discrepancies between their current situations and their desired situations.

The four levels of **Buyer Need** are:

1. No Need
2. Dormant Need
3. Visible Need
4. See Your Solution

Notes:

SKILLSET

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Coaching Guide for Coaches and Facilitators

Coaching Session (Part B):

Collaborative Discovery

This module on *Collaborative Discovery* is the cornerstone of the Trustworthy Selling approach. The collaborative discovery process is where the sale is typically made, and we help participants understand the benefits of engaging in courageous conversations with prospects and clients. We begin by focusing on consumer preoccupation and the value of good listening skills, then we explore the art and science of questioning to understand more clearly the buyer's need. We introduce participants to the RPM Questioning Model™ to help them dig more deeply and develop more meaningful relationships. The RPM provides financial professionals with a process to increase the sense of urgency and gain agreement to move forward.

Participant's Recommended Action Steps:

- Be prepared to discuss your Strategies to Test and results achieved from your Turning Insights into Action.
- Complete the *Collaborative Discovery Skills Assessment* each week following the program and work on improving 1-2 best practices weekly.
- RPM Question Model —
  - Build on the reality questions found in your organization's discovery document/fact finder
  - Develop "Pain/Gain" and "Magnification" questions to enhance these questions.
  - Begin using the questions in the collaborative discovery meetings that take place over the coming weeks.
  - Be prepared to role-play the RPM Questions with your coach during the session.

Coach Preparation:

1. Review Language Demonstration Videos
   - **RPM Questioning Model – Life Insurance Questions**
   - **RPM Questioning Model – Retirement Questions**
2. Review the *Collaborative Discovery Skills Assessment* (you may want to complete the assessment yourself for context).
3. Prepare for Collaborative Discovery Role-Play.
   - Review *Collaborative Discovery* Role-Play Resource
   - Review *RPM Question Guide* in the Role-Play Resource section
   - Review Role-Play Observer form

Conducting the session:

1. Discuss and review the participant's Recommended Actions Steps.
2. Review and discuss the *Collaborative Discovery Skills Assessment* 3 (three) areas for improvement and opportunities they plan to work on developing.
3. Conduct the *Collaborative Discovery* role-play, capturing your notes in the Observer Form.
4. Spend a few minutes asking a few Discussion Questions of the participant.

Discussion Questions

- Reflecting upon your captured *Turning Insights into Action* from Collaborative Discovery, which insights resonated most with you and what results have you experienced when adopting them?

Collaborative Discovery Questions

- When you completed the Collaborative Discovery Skills Assessment, what top three (3) strengths did you identify?
  - In what three (3) areas do you feel you stand to improve the most?
  - What strategies will you employ to strengthen your questioning skills?
- How does collaborative discovery align with our company fact-finder?
- What new questions have you developed based on the RPM model?
  - Have you had a chance to use them?
    - What kind of reaction have you received?
    - What modifications have you made?

Catch-all Questions

- How confident are you that you can execute on the Collaborative Discovery based skills you learned in this program?
  - What might get in the way of your success?
- What do you need from me in the way of additional support?

Collaborative Discovery Skills Assessment

Content Sample Note:

Take the Collaborative Discovery Skills Assessment for yourself! How did you do?

Participant Directions: Reflect back to determine how frequently you practice eac
behaviors, and check the box that corresponds to that behavior. When finished, ad
together, and use the scale at the bottom to determine what kind of relationship de

	ALMOST ALWAYS	OFTEN	SOMETIMES	SELDOM	NEVER
1. I consistently utilize open-minded, feeling questions during the discovery process.					
2. I get the prospect to visualize their future goals and dreams.					
3. I consciously avoid judging a prospect's values when they are not similar to my values.					
4. I avoid taking the path of least resistance in the discovery process when I know it is in the prospect's best interest.					
5. I do an effective job of building rapport and reducing the prospect's relationship tension during the discovery process.					
6. I challenge prospects when their intentions are not aligned with their actions during the discovery.					
7. I use clarifying questions to ensure I understand exactly what the prospect is saying.					
8. I effectively increase the prospect's desire/motivation to solve their problem during the discovery process.					
9. I use the prospect's exact words from the discovery to challenge them when their actions are misaligned with their intentions.					
10. I schedule the closing appointment at the conclusion of the discovery process.					
11. I am effective at digging deep and getting to the core of a prospect's issues or concerns.					
12. I am effective at finding the prospect's energy and hot buttons around certain issues.					
13. I take the time to discuss certain issues when a prospect's perception is unrealistic or inaccurate.					
14. I verbally paraphrase my understanding of the prospect's situation at the conclusion of the discovery process.					
15. I get the prospect to identify their priorities at the conclusion of the discovery meeting.					
16. I send a written letter to the prospect following each discovery meeting to recap and highlight the meeting.					
17. I gauge the prospect's level of commitment at the conclusion of the discovery.					
18. I get a financial commitment at the conclusion of the discovery.					
19. I avoid getting defensive or emotionally charged during the discovery.					
20. I avoid making assumptions about the prospect's situation.					
TALLY TOTALS	5 POINTS EACH	4 POINTS EACH	3 POINTS EACH	2 POINTS EACH	1 POINT EACH
DO YOU CREATE DESIRE? (GRAND TOTAL)					

100-92=I'M A MACHINE | 91-75=GAINING MOMENTUM | 74-46=DECENTLY | 45-29=JUST WELL ENOUGH | 28-20=QUITE POORLY

Collaborative Discovery Role-Play Resource:

Participant Directions: Build from the reality questions found in your organization's discovery document/ fact-finder, develop Pain/Gain and Magnification questions to enhance these questions. Record the reality question you start with and the questions you develop in the chart below.

Reality Question	Pain/Gain Questions	Magnification Questions
What type of funds do you hold in your retirement plan?	How confident are you that your current retirement plan will enable you to accomplish your objectives?	What will you do if you reach retirement and you haven't achieved your objectives?

SKILLSET

powered by Trustworthy Selling

Coaching Guide

for Participant

Introduction

Welcome to the SkillSet *powered by* Trustworthy Selling® Coaching Opportunities.

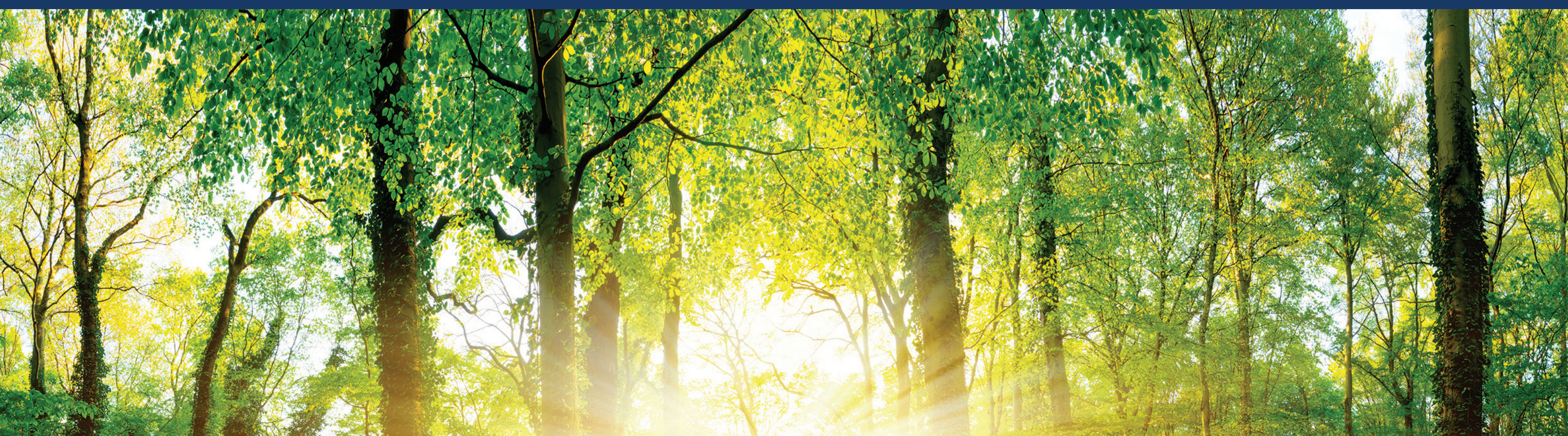
At the completion of each module, you were asked to "Turn Insights into Action" by identifying what you can apply on the job and what you need to do in order to do so. There were also Recommended Action Steps for you to complete in order to immediately apply what you learned in each module.

The 30-minute coaching session is built around these activities. They provide the building blocks for post-program action plans and are instrumental in evoking productive behavior change. The coaching session also ensure accountability and follow-through on your behalf.

To make the most out of these sessions,

1. Attend the session prepared – completing all assignments.
2. Bring your Coaching Guide with you.
3. Take notes and write down important points shared with you to continue skill development.
4. Do what you say you are going to do.

Coaching Content for Participant



Coaching Session (Part B):

Collaborative Discovery

This module on *Collaborative Discovery* is the cornerstone of the Trustworthy Selling approach. The collaborative discovery process is where the sale is typically made, and we help participants understand the benefits of engaging in courageous conversations with prospects and clients. We begin by focusing on consumer preoccupation and the value of good listening skills, then we explore the art and science of questioning to understand more clearly the buyer's need. We introduce participants to the RPM Questioning Model™ to help them dig more deeply and develop more meaningful relationships. The RPM provides financial professionals with a process to increase the sense of urgency and gain agreement to move forward.

Participant's Recommended Action Steps:

- Be prepared to discuss your Strategies to Test and results achieved from your Turning Insights into Action.
- Complete the *Collaborative Discovery Skills Assessment* and work on improving 1-2 best practices weekly.
- **RPM Question Model**
    - Build on the reality questions found in your organization's discovery document/fact finder.
    - Develop "Pain/Gain" and "Magnification" questions to enhance these questions.
    - Begin using the questions in the collaborative discovery meetings that take place over the coming weeks.
    - Be prepared to role-play the RPM Questions with your coach during the session.
- Reference Knowledge Review eLearning to test knowledge (Mod 6).

RPM Question Match Knowledge Review

During the session:

1. Discuss and review the Recommended Actions Steps with your coach.
2. Review and discuss the *Collaborative Discovery Skills Assessment* 3 (three) areas for improvement and opportunities you plan to work on developing.
3. Participate in the *Collaborative Discovery* role-play with your coach.

Discussion Questions your coach may ask you:

- Reflecting upon your captured *Turning Insights into Action* from this module, which insights resonated most with you and what results have you experienced when adopting them?

Collaborative Discovery Questions

- When you completed the Collaborative Discovery Skills Assessment, what top three (3) strengths did you identify?
    - In what three (3) areas do you feel you stand to improve the most?
    - What strategies will you employ to strengthen your questioning skills?
- How does collaborative discovery align with our company fact-finder?
- What courageous conversations have you taken part in since completing the core learning?
    - What was the outcome?
- What new questions have you developed based on the RPM model?
    - Have you had a chance to use them?
        - What kind of reaction have you received?
        - What modifications have you made?

Catch-all Questions

- How confident are you that you can execute on the Collaborative Discovery based skills you learned in this program?
    - What might get in the way of your success?
- What do you need from your coach in the way of additional support?

Collaborative Discovery Skills Assessment

Participant Directions: Reflect back to determine how frequently you practice each of the following behaviors, and check the box that corresponds to that behavior. When finished, add all your numbers together, and use the scale at the bottom to determine what kind of relationship developer you are.

	ALMOST ALWAYS	OFTEN	SOMETIMES	SELDOM	NEVER
1. I consistently utilize open-minded, feeling questions during the discovery process.					
2. I get the prospect to visualize their future goals and dreams.					
3. I consciously avoid judging a prospect's values when they are not similar to my values.					
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Participant Directions: Build from the reality questions found in your organization's discovery document/fact-finder, develop Pain/Gain and Magnification questions to enhance these questions. Record the reality question you start with and the questions you develop in the chart below.

Reality Question	Pain/Gain Questions	Magnification Questions
I.e. What type of funds do you hold in your retirement plan?	I.e. How confident are you that your current retirement plan will enable you to accomplish your objectives?	I.e. What will you do if you reach retirement and you haven't achieved your objec-tives?

Content Sample Note:

SkillSet is easy to implement, easy to execute. ***There is no Facilitator Certification or Coach Certification requirements*** associated with the SkillSet edition of the Trustworthy Selling product line.

These two pages outline the support we provide to prepare your Facilitator and/or Sales Leaders to effectively facilitate the SkillSet program.

Step by Step Guide for Facilitator Prepara

Step 1: Preparation for Facilitators (90 minutes)

Assignment		Additi
Target Completion Date:	**Familiarize yourself with the program materials.** **Facilitator Materials -** • Licensing Agreement • Facilitator Guide - Introduction Section • Facilitator Guide Modules **Participant Materials -** • Participant Course Introduction • Participant Guide Modules	• You can a materials • You can a materials • **Read the of the FG** • **Read the Module Overviews for each Module of your program's delivery** to gain a basic understanding of how each module is set up and the content delivered in the program.

Step 2: Facilitator Preparation Onboarding Sessions (45 minutes)

Assignment		Additional Actions to Take:
Target Completion Date:	**Facilitator Onboarding eLearning Sessions** Topics include why the program was developed, the role of the facilitator, the role of the coach, the suite of tools used in delivering the turnkey program, and a deep dive into program content and how to conduct a coaching session. **NOTE:** *If you exit an eLearning module and see an "In Progress" notation in the upper right hand corner of the module link, the eLearning module is not complete.*	• **Complete the** Foundation and Coaching eLearning **courses**.

Step by Step Guide for Facilitator Preparation

Step 3: Preparation for Delivery (30 minutes)

Assignment		Additional Actions to Take:
Target Completion Date:	**Prepare for Delivery.** **If delivering the course in person:** Read the content and watch the videos using the Facilitator Guides. Familiarize yourself with the Participant Guide materials that support these modules. Complete any assessments outlined within your modules for delivery. Note: not all modules require the completion of assessments. Prepare yourself to facilitate the content in a classroom environment. **If delivering the course virtually:** Read the content and watch the videos using the Facilitator Guides. Familiarize yourself with the Participant Guide materials that support these modules. Complete any assessments outlined within your modules for delivery. Note: not all modules require the completion of assessments. Prepare yourself to facilitate the content in a virtual classroom environment by leveraging the virtual classroom resources on the tsprogram website.	• Review the Facilitator Pre-Reading guide. • You can access the Facilitator Guide materials on the TSProgram website. • You can access the Participant Guide materials on the TSProgram website. • VC PowerPoint Slides for virtual training delivery • Watch the Facilitator VC Best Practice Demo videos for the modules you will be delivering. • Identify the tools, resources, and information needed to facilitate your session.

Your self-paced facilitator preparation is now complete!

Contact your company's designated Program Coordinator for details regarding your SkillSet *powered by* **Trustworthy Selling class.**

SkillSet powered by Trustworthy Selling Program Support

LIMRA and the Hoopis Performance Network teamed up to design a sales effectiveness program that can equip your sales team with solutions to engage today's consumers and increase sales. The Trustworthy Selling product line is the only sales effectiveness program that was created by the industry, for the industry! Trustworthy Selling (Quick Start and Professional) have proven to increase sale's performance, as they are anchored in LIMRA's industry specific consumer research, combined with field tested language use by HPN's extensive network of top producers.

Productivity is measured before and after training to determine positive Return on Investment (ROI).

Results* show numbers that directly impact your bottom line:

- 32% lift in Premiums
- 25% increase in New Clients
- 17% increase in Policy Count
- 21% lift in Retention Rates
- 93% of Participants have rated this program as "A Valuable Use of Their Time"

**impact is based on participants who have gone through the Trustworthy Selling program versus those who haven't, from the same company/business unit.*

SkillSet *powered by* Trustworthy Selling pulls together the top adopted skills from the Trustworthy Selling program that lead to the biggest impact in overall productivity. We know that greater skill adoption leads to greater business impact. Of the 15 skills making up the SkillSet program, 50% or more of respondents to our impact survey indicated that they have changed their behavior, on average, in regards to 12 of the 15 techniques, for an 80% change rate. It is reasonable to conclude that productivity impact will be higher and positively influenced by the application of these particular skills and techniques.

We designed SkillSet to support launching new advisors, retaining those 2-5 years in their career, to re-igniting veteran producers in their careers. SkillSet improves efficiency, effectiveness, and profitability among your sales team members. This program helps your team get in front of the right people, build trust quickly, and identify the needs and desires of the potential client through the art of questioning.

SkillSet is easy to implement, easy to execute. The live classroom experience can be delivered in 1-day or you can easily break it into two 3-hour sessions. The VC experience can be delivered in 3 distinct 2-hour sessions over a period of time. We work with you to help determine the best delivery model for your organization.

We know when Coaching is added that our client companies experience even higher productivity among program participants. "Good" coaching that reinforces the skills and techniques taught in the program further enhances the lift in productivity your participants' experience!

SkillSet Implementation

- Fully scripted, instructionally designed classroom materials include:
  - Facilitator Guides
  - Participant Guides
  - PowerPoint presentation slides designed to support virtual classroom delivery
  - Supporting resources and tools that can be used during the learning experience and after class to support skill adoption
  - Tsprogram website access to leverage all materials prior to, during, and after program delivery
- Consulting and assistance with class delivery schedule and implementation.

Trustworthy Selling Website User Management

All of the program's materials and content are delivered to you through our online portal – the tsprogram website. You will now be able to provide your SkillSet program participants with direct access to the website to prepare for your classes and support their skill adoption after program participation. The Trustworthy Selling Website platform gives Class Administrators direct access to its User Management functions to enroll participants in the correct training cohorts and learning opportunities. Class Administrators are able to set up web access for participants at his or her convenience.

SkillSet powered by Trustworthy Selling Frequently Asked Questions (FAQs)

DELIVERY METHOD:

Q: Which delivery method is right for your organization?

A: The SkillSet program has flexible delivery materials to meet your needs for scalability geographical considerations and effective e xecution of the program to your participants.

- In Person classroom delivery materials support your delivery of the program content to participants in a specified location, during a specified time frame.
- Virtual classroom delivery materials support your delivery of the program content to participants using the virtual classroom tool of your choice. O u r materials are d esigned to be platform agnostic and will work o n any vir tual classro om environment.
- Blended delivery combines in person classroom delivery with onli ne virtual classroom delivery, breaking the program into training segments that can be delivered using the delivery method most appropriate for your organization's needs.

ROLES:

Q: Who is the facilititator?

A: The facilitator role is to introduce concepts, facilitate discussions, keep track of time, give instructions for activities, and model positive learning behavior. Since all the core content and subject matter expertise is delivered by video based lectures and presentations, a facili tator is not required to be a content matter expert. Follow the suggested script in the facilitator's guide for maximum use of time

Q: Who is the coach?

A: The person who is responsible for guiding participants after program delivery, reinforcing concepts, and serving as a mentor for the skill development and adoption from the program participants. The coachs role Is not to provide all the answers, rather, to help the participant discover and m ake decisions on his or her own. Throughout the program, coaches are expected to:

- Be available to answer questions
- Provide examples for the producer to observe
- Offer feedbackOffer feedback
- FollowFollow-up on action items

Q: Who is the participant?

A: The person who is considered the learner in the SkillSet class. The participant will be expected to complete pre work assessments based on their program version In addition, participants should attend all scheduled sessions. They will view the module videos as appropriate to their delivery method and engage in various discussions and adult learning activities throughout the curriculum. In order to officially complete the SkillSet p rogram participa nts are required to compl ete a 2 0 question multiple choice exam via the Trustworthy Selling program website.

Q: Who is the program coordinator?

A: The person within a client's company, typically an administrative person, who is responsible for:

- Officially launching the SkillSet *powered by* Trustworthy Selling class
- Sending the pre work assignment to participants (if engaging in the virtual classroom delivery)
- Supporting participants and coach with coaching opportunities
- Ensuring participants properly complete the SkillSet program with successf ul completion of the Final Exam