

A Day with Dave Stein

For Sales VPs and Marketing VPs

Objective:

The challenges and opportunities that sales executives and their marketing counterparts face today are daunting. Not only do their to-do lists increase in size and importance—by the day it seems—but often the objectives and goals they are pursuing appear to be moving targets. These executives are often so entrenched in the details of execution that they rarely have time to assess where they are, where they need to be, and how to get there.

Very few of these executives have the opportunity to avail themselves of focused, one-on-one coaching. Coaching provides them with an outside perspective, fresh, new approaches to old challenges and opportunities, and a platform to uncover new ways to grow their businesses more efficiently and effectively.

The senior executives and CEOs to whom the sales and marketing executives report are rarely the best people to assist them. They may not have focused expertise in areas that need work, they may be just too busy, or they may not have the coaching skills required.

Dave Stein has coached sales reps, their managers, and C-level executives for more than 20 years. With deep experience in sales and marketing, an open and supportive coaching style, and diligent preparation, Dave has provided many sales and marketing executives with precisely what they needed to assess their situation, reformulate goals and objectives, devise new strategies and tactics and then effectively execute.

Most often Dave works with either a VP of sales or a VP of marketing, but has had success working with both together. The result, in the words of the people with whom he has coached in this situation, is alignment.

Pre-session Activities:

Activity	Description
Pre-session phone call with executive	During this 45-60 minute call, Dave and the executive discuss the current situation, immediate and longer-term challenges and opportunities, what is working and what is not, and specifically what the executive is seeking from the coaching session.
Confirmation of agenda with manager	Dave will suggest an agenda based upon the initial discussion. Often executives have a specific challenge that is foremost on their mind, which becomes the main subject for the day. The executive will have final approval on the agenda.

Activity	Description
Pre-session assignment if required	Often in order to get the most out of the day, Dave will ask the executive for certain information they may not have. It could be some sales-related statistics. In other cases Dave may ask the executive to read a certain book or series of articles.

Schedule for the Day (Martha's Vineyard Location):

Start	End	Activity
8:00		Executive arrives by plane. Dave meets them at airport.
8:30	9:00	Agenda review. General discussion. Coffee and light snack.
9:00	12:00	Intense coaching session
12:00	1:00	Lunch. Discussion continues.
1:00	5:00	Intense coaching session continues
5:00	6:30	Optional auto tour of Martha's Vineyard or walk to beach.
7:00		Executive departs to Boston, Providence, La Guardia, or other location.

Potential Subjects to be Covered:

Dave and the executive will determine where to focus the session. Although time allows deep discussion covering three to five of these bulleted topics, many others are touched upon during the course of the day.

1. Marketing Support of Sales

- Approach to target markets, pricing/fee validity
- Clarity and consistency of value articulation at different levels and areas of responsibility within the customer organization
- Effectiveness of press/analyst coverage. Where are you and what needs to be done?
- Demand creation activities and initiatives.
- Lead management effectiveness, tracking, metrics.

2. Opportunity Management

- Sales methods, practices and processes
- Adherence to current processes. Is the North American infrastructure scalable?
- Sales planning (planning, as opposed to sales plans)
- Pipeline management
- Forecasting methods and effectiveness

3. Sales Tools

- Corporate presentation
- Collateral materials
- Competitive tools
- Customer proposal quality and value articulation
- Customer testimonials and case studies

4. Sales Execution

- Obstacles and enablers to success
- Skills gaps of the people who sell for you
- Causes of closing, discounting, slippage
- Process improvement mechanisms
- Hiring and developing sales talent

5. Ongoing Account Management

- Transition from pre- to post-sales
- Long-term account goals and approaches

6. Sales and Marketing Alignment

- Current challenges
- Goals and strategies going forward for effective selling

7. Challenges/Opportunities regarding the rest of the management team, corporate culture, business practices, etc.

Post-session Activities:

Activity	Description
Post-session follow-up	Dave and the executive will have a final discussion reviewing the coaching session, post-session progress, and final recommendations. This typically occurs about two weeks after the session.

Fees:

Contact Vivian Engel at +1 (845) 621-4100 for fees.

References:

References will gladly be provided when an initial agreement is reached.

About Dave Stein:

Before he founded his New York-based consultancy, The Stein Advantage, Inc., in 1997, Dave Stein held many diversified positions: programmer, systems engineer, sales representative, sales manager, director of worldwide sales development, VP of sales, VP of marketing, VP of international operations, VP of client services and VP of strategic alliances.

During the early 1990's, Dave lived and sold in Europe, commencing international operations for the technology company he helped to build. In the decade since, Dave has focused on coaching experienced sales teams worldwide, for companies from \$5 million in sales to the Fortune 100. His unique skills in competitive sales strategies and political positioning combined with the success he has brought to his clients make Dave much in demand as a speaker, author, consultant, coach, and trainer. His Amazon bestseller *How Winners Sell* is now in its Second Edition.

The Stein Advantage is a New York-based consultancy. The Stein Advantage offers companies diagnostic and remedial expertise to hire top sales professionals, better position themselves in the eyes of industry analysts, overcome tough competitors, motivate their sales forces, and refocus their selling efforts to achieve new levels of credibility and differentiation with higher-level executives to whom they are selling.

Dave is a member of the Executive Advisory Board of the Fisher Institute for Professional Selling, where his book, *How Winners Sell* is being used.

Dave Stein is often quoted and recognized in leading business magazines and websites, including Fast Company, The New York Times, BusinessWeek, Inc., Fortune, and Forbes. Dave writes a monthly sales column for Sales & Marketing Management Magazine and is frequently a presenter for Microsoft, WebEx, and SellingPower Live.

He is an instrument-rated pilot, airplane owner, bicyclist, skydiver, scuba diver, firewalker, and early adopter of technology along with being a recognized expert on business-to-business sales, marketing and service.

He is a professional member of the National Speakers Association as well as a speaker for and member of Sales and Marketing Executives International (SMEI). He is also a member of ASTD. Dave is a native New Yorker with two grown daughters and a grandson. He and his wife live and work north of New York City and on Martha's Vineyard, Massachusetts, with their dog and two cats.

WIN

Author of "How Winners Sell"