

Facilitator's Guide
Making it Count for Sales:
The What, Why and How of Diversity and Inclusion

VisionSpring
Inclusion Learning Loop

Making in Count for Sales: The What, Why, and How of Diversity & Inclusion

INTRODUCTION

What is an Inclusion Learning Loop™ Training Toolkit?

The Inclusion Learning Loop™ training toolkits are complete out-of-the box training curriculums that provide Inclusion Learning Loop™ members access to a library of diversity- and inclusion-related workshops. All of our toolkits include facilitator materials, a PowerPoint presentation, pre-work or foundational materials and an action planning worksheet. Each of our training toolkits equips trainers with all the information, tools and materials needed to deliver a rich and comprehensive development experience.

What is the Making it Count for Sales: The What, Why, and How of Diversity & Inclusion Toolkit?

The Making it Count for Sales: The What, Why, and How of Diversity & Inclusion is a 75 – 90 minute training that can be leveraged by D&I practitioners as part of their training offerings. The training is designed to help sales professionals recognize and understand the business case for diversity and inclusion.

Who is it designed for?

The intended participant is any sales professional within the organization. This workshop is designed to be delivered by diversity and inclusion practitioners and trainers. **Some facilitation skill and an intermediate-to-advanced level of D&I competency is required to lead a successful meeting.**

How can you use it?

This workshop can be included as part of your organization's internal D&I training offerings offered to sales. This workshop can be delivered by a facilitator who has training skills and knowledge of diversity and inclusion. You will also find the PowerPoint presentation to accompany this facilitator's guide. Tools to enhance subject knowledge are provided on the [Inclusion Learning Loop™](#).

This session can be effectively executed in 75-90 minutes depending on the size of the group and the amount of time you want to dedicate to discussion.

Exercise objectives:

During this workshop participants will explore the concepts of diversity and inclusion with a specific focus on the role of sales. The goal is to help participants better understand Diversity and Inclusion and why it's important.

Learning Outcomes:

- Discuss the concepts of Diversity and Inclusion and the connection to overall mission and goals
- More deeply explore the critical role sales will play in D&I objectives
- Find ways to incorporate a D&I mindset into projects and day-to-day work
- Strengthen your own D&I capability

Materials:

Flip chart and markers

Tape to post flip chart pages

Name tags or cards (depending on audience)

Copies of Action Plan Worksheet for each participant

A PowerPoint Presentation had been provided as part of this [toolkit](#)

Facilitator Preparation: Review Content and Materials

Familiarize Yourself with the Workshop Materials and the Content

1. Review Facilitator Guide
2. Review [PowerPoint](#)
3. Review background information materials to become knowledgeable on the content
4. Additional reading materials can be found in the [Articles Section](#) – Sales on the Inclusion Learning Loop™

Decide if you will Assign Participant Pre-work

Decide if you want the participants to read articles prior to the workshop or if you want them to “hear” the information for the first time via the presentation.

1. Suggested articles

[Making it Count for Sales: The Business Case for Diversity and Inclusion in a B-to-B Marketplace](#)

[Reaching Clients and Customers: It's all About Inclusion](#)

[12 Psychological Biases Affecting How You Sell](#)

2. Decide how you would like to use the materials
3. If assigning as pre-work, send the link to all participants at least one week prior to the workshop

Assemble all Workshop Materials

1. Review materials list and secure through proper channels
2. Decide if you are going to print participant materials or supply them electronically to all workshop attendees.
 - a. if yes, print participant materials

Workshop Agenda

Section I: Welcome and Introductions (15 minutes)

Opening Remarks
Present Session Objectives
Ice-Breaker Exercise – I Am Statements

Section II: What, Why & How of Diversity & Inclusion - (25 minutes)

Large Group Discussion–What Does Diversity Mean to You? - 10 minutes
Presentation – Sharing of Definitions & Key Concepts – 5 minutes
Presentation – The Customer Connection Framework – 10 minutes

Section III: Interactive Exercise - (30 minutes)

Interactive Exercise – Exploration through Scenarios – 25 minutes
Exercise Debrief and Learning Points – 5 minutes

Section IV: Personal Action Planning (20 minutes)

What Did I Learn?
What Will I Do?
Prepare Action Planning Worksheet*

Section V: Wrap Up, Actions and Next Steps (5 minutes)

Review of Learning Outcomes
Next Steps

* In order to shorten the length of the workshop, consider allowing participants to complete their action planning workshops independently.

Section I: Welcome and Introductions

Welcome, Workshop Objectives and Agenda

Say: *Good morning. We are happy to be here today and are looking forward to the workshop! In today's session we are going to explore the concepts of diversity and inclusion with a specific focus on the role of sales. The goal is to help you better understand Diversity and Inclusion at (**your company**) why it's important, and how diversity and inclusion can help you achieve your goals. Throughout the next couple of hours, we will:*

- *Discuss the concepts of Diversity and Inclusion and the connection to our overall mission and goals*
- *Strengthen your own D&I capability*
- *More deeply explore enhancing your D&I knowledge can enhance your sales capability*
- *Find ways to incorporate a D&I mindset into your day-to-day work*

Ground Rules

*Listen actively
Be open to new ideas
Ask questions
Parking lot
Have fun*

Icebreaker Exercise: I AM...

The purpose of this exercise is to create an opportunity for participants to explore and discuss the many dimensions of diversity while getting to know one another on a more personal level.

Instructions:

Say: We are going to kick off this workshop with an ice breaker exercise that provides you all with an opportunity to get to know each other better, form broader connections and explore the many dimensions of diversity that make us all unique and bring us all together.

Take the next 2 minutes to formulate 3 I Am statements about yourself. Your statements should be personal in nature and describe who you are and what you'd like to share about yourself. For example, your I am statements might be

- *I am a mother of 3 boys*
- *I am fluent in 4 languages and*
- *I am a foodie*

Once you've created your I Am statements we are going to invite you to share your I Am statements with others in the room using a speed-dating format.

Give 30 second warning after 90 seconds.
At 2-minutes ask if everyone is ready.

Provide Instruction for “speed-networking”

In the next five minutes, walk around the room and share your “I AM” statements with as many of your colleagues as possible.

Discussion Debrief:

1. What did you learn about the others in the room?
2. What were the intersections / commonalities you found?
3. What surprised you?

The Business Case for Diversity and Inclusion

Say: Navigating any relationship can be challenging. Building and managing relationships across difference can pose even deeper challenges and requires some cultural knowledge to navigate this terrain.

As sales and business development professionals your main priority is to generate new business and serve your clients or customers. Sales is the lifeblood of any organization and our ability to generate sales is as dependent on our ability to build relationships with our clients as it is about the quality of the services and products we provide. Your success as a sales professional is linked to your ability to understand, serve and build relationships with your clients and customers.

Open to participants for large group discussions. The objective is to get the group to understand that dealing with diverse customers, clients or new niche markets is not unlike dealing with more traditional clients but does require some homework and cultural understanding.

When you think about serving customers or clients, what model behaviors come to mind?

How would that differ from serving a new or diverse client?

What can you do to prepare yourself for a meeting with a new and/or diverse client?

Allow 7 - 10 minutes for discussion.

Summarize responses and share the Customer Connections Framework below.

Action Planning Worksheet

What have I learned as a result of this session?

How does what I have learned apply to my current situation?

Conclusions: How can I apply what I've learned to enhance my sales capability and improve outcomes?

What are my goals?

1.

2.

3.

Accountability Coach:

Follow up Meeting Date:

Action Items: Required Support: Deadline:

Section V: Wrap Up, Actions and Next Steps

We want to close out this section first and foremost by thanking you for your time today.

We also ask you to commit to do four things:

1. Complete your action plans in the next 48 hours.
2. Refer back to your plan and make progress every week.
3. Meet with your accountability coach in the next 4 weeks.
4. Incorporate diversity and inclusion into your everyday conversations and keep D&I top of mind as you conduct your day-to-day work.

Review any additional next steps for your organization.