

LEVEL UP WORKSHOPS

Sometimes the difference between winning and losing a deal comes down to execution in a few key moments across the sales cycle. Level Up workshops are instructor-led, small-group working sessions designed to help sellers execute in those moments.

Level Up Workshops

Audience: Front-line Sellers;
(max. 15 participants)

Agenda: Prepare for active sales situations using foundational Challenger principles.

- Peer collaboration
- Personal coaching
- Group exercises

Pre-Work: Select and complete a basic task focused on one active opportunity/account situation.

Outcome: Sellers have a plan and usable output for the active situation (e.g., an improved email draft to use immediately)

SAMPLE AGENDA (2 hrs.)



Advisor-Led Practice

- Challenger principle-in-focus
- Full group opportunity reviews
- Team feedback and recommendations

Small Group Peer Drills

- Peer opportunity reviews and feedback
- Advisor-led individual and small group coaching

Advisor-Led Action Plans

- Key takeaways and improved outputs
- Tactical next steps and action plans
- Advisor-led calls-to-action for full group

Immediately following the workshop...

Managers-Only Debrief (30 min)

- Manager-only debrief with instructor to capture in-the-moment observations
- Instructor and managers synthesize critical skill gaps and prescribe next-step coaching priorities

Participants leave Level Up Workshops with an improved plan for an active sales situation.

Level Up Workshops now available...

Prospecting

The moment that matters...

You've identified a high-potential opportunity or top-tier account that you need to pursue.

Sellers will leave with...

An **opportunity analysis** and strong **hypothesis** for preparing an insight-led message for initial outreach.

Outreach

You've identified an individual stakeholder in an organization or account with whom you'd like to schedule a first sales call.

A ready-to-use **email** or **cold call plan** that has a better shot of getting you the meeting.

Discovery

You've got the first call scheduled and you're preparing your agenda, message, and strategy.

An agenda and list of **powerful questions and requests** you plan to use in an upcoming discovery call / early sales interaction.

Business Case Building

You've been working with a stakeholder, and they're interested, but you need a strong(er) business case to gain access to the entire buying group.

A **customer metrics list** and **pain of same statements**.

Group Meeting Facilitation

Your stakeholder has coordinated a group meeting. You need to prepare the agenda and discussion that will get them all on the same page.

An **agenda** and **facilitation plan** for your upcoming group meeting.

Challenger

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