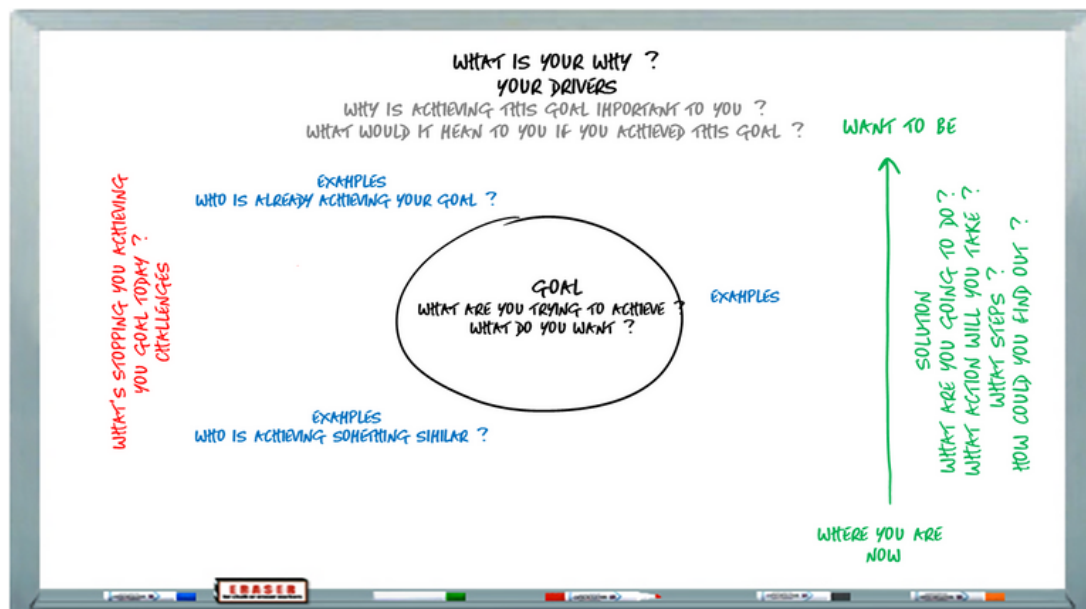


# UNCOVERING NEEDS USING THE WHITEBOARD METHODOLOGY

The objective of this lecture is to teach you the basic design and principles of the Whiteboard methodology and give you an opportunity to practice those skills

**The Whiteboard Methodology follows 5 simple steps:**

- **Goal** - What is the person you are speaking to trying to achieve?
- **Drivers** - Why is achieving this goal important to them?
- **Challenges** - What is stopping them from achieving it today?
- **Examples** - Who do they know that is already achieving something similar?
- **Solution** - What is the way to move from where they are now to where they want to be?



# UNCOVERING NEEDS USING THE WHITEBOARD METHODOLOGY

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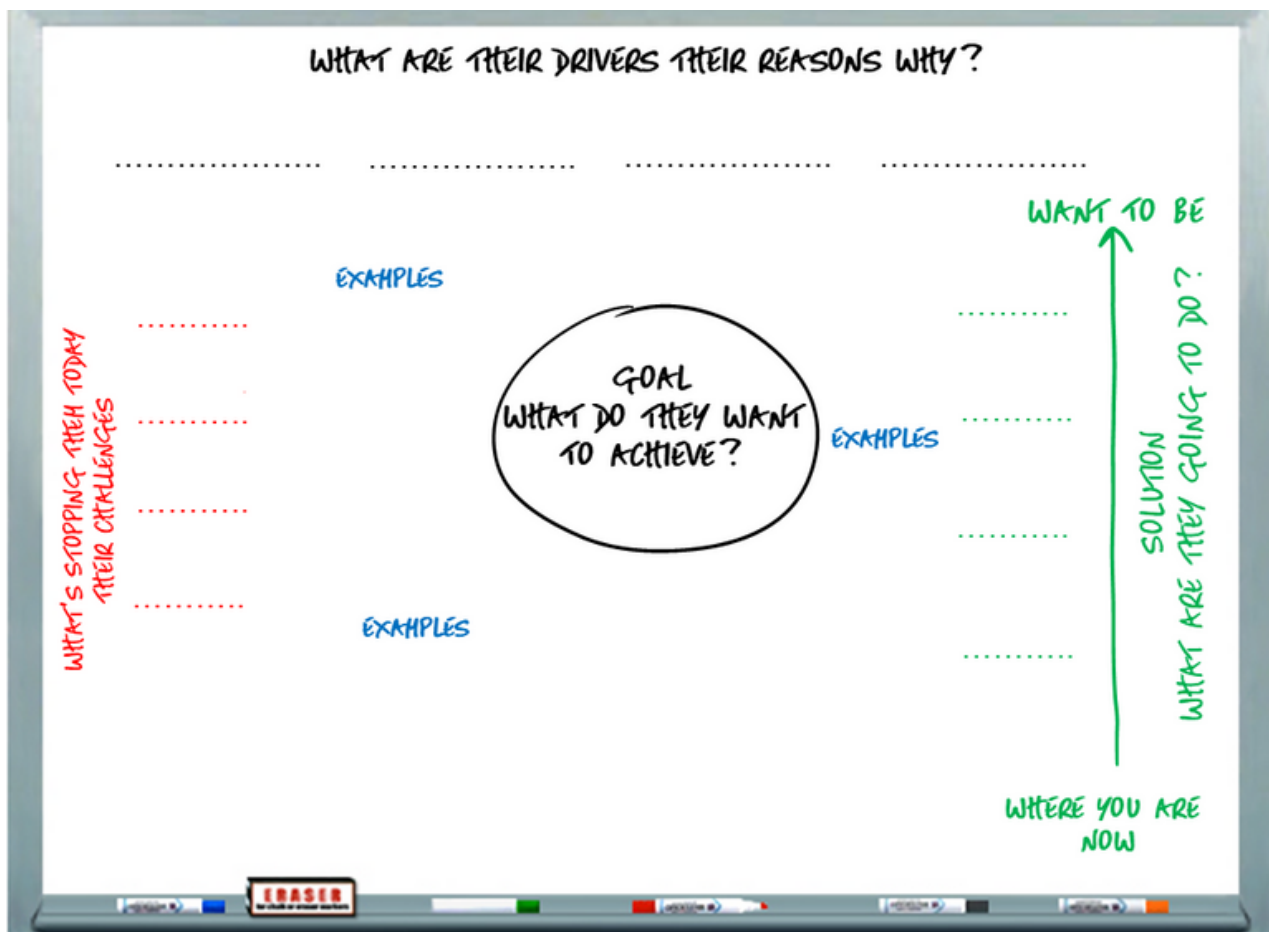
***Notes:***

**"Never stop learning, because life never stops teaching"**

# UNCOVERING NEEDS USING THE WHITEBOARD METHODOLOGY

## Assignment

Your assignment is to find someone that you know - a friend / colleague, family member - that would like coaching on achieving a goal, then use the Whiteboard Methodology to help them develop a way forward. Use the questions on the next sheet and blank whiteboard below to help.



# UNCOVERING NEEDS USING THE WHITEBOARD METHODOLOGY

## Assignment

Your assignment is to find someone that you know - a friend / colleague, family member - that would like coaching on achieving a goal, then use the Whiteboard Methodology to help them develop a way forward. Use the questions on the next sheet and blank whiteboard below to help.

## Great Questions to Ask When Using The Whiteboard

### Goals

- *What is your main goal for this year?*
- *How will you know you have achieved it?*
- *How will it feel when you have achieved it?*

### Drivers

- *Why is achieving that goal important to you?*
- *What is it about achieving that goal that is important to you?*
- *How will you or it feel when you achieve that goal?*
- *What will it mean when you achieve that goal?*

### Challenges

- *What is stopping you achieving that goal today?*
- *What have you already tried that hasn't worked?*
- *Why didn't it work?*

### Examples

- *Who do you know who has already achieved your goal or something similar? What did they do ?*
- *Who do you look to as the best of the best in this area? Why ? What makes them the best ?*

### Way Forward

- *What do you intend to do now ?*
- *What would you like to do now ?*
- *What could be the first step on your journey ?*
- *How would you like to proceed ?*
- *How can we support you in your journey ?*

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---

***Notes:***

# UNCOVERING NEEDS USING THE WHITEBOARD METHODOLOGY

## Questioning Skills:

Great selling starts with asking great questions and listening to what your prospect or customer says in reply.

---

## *Power of Questioning*

### **OPEN**

UNDERSTAND MORE  
UNCOVER FACTS  
FIND OUT MORE  
SHOW INTEREST

### **CLOSED**

CONFIRM UNDERSTANDING  
CLOSE A POINT  
REINFORCE A POINT



# UNCOVERING NEEDS USING THE WHITEBOARD METHODOLOGY

## Assignment - Questioning Skills

Your assignment is to write down 5 great open questions you can ask your prospect or customer and 5 great closed questions.

Then once you have these prepared give them a "road test" on your next call or meeting.

---

## *Power of Questioning*

### *Notes:*

#### **OPEN**

WRITE DOWN EXAMPLES  
OF GREAT OPEN  
QUESTIONS YOU COULD ASK

#### **CLOSED**

WRITE DOWN EXAMPLES  
OF GREAT CLOSED  
QUESTIONS YOU COULD ASK

# UNCOVERING NEEDS USING THE WHITEBOARD METHODOLOGY

**Rapport building**

**Rapport = "Building a close and harmonious relationship"**

**Rapport = "Building connections"**

**Rapport is created because people like people like them**

---

## ***Building Great Rapport***

### ***Notes:***

***Question: what % of connection is built with the way you use your physiology?***



# UNCOVERING NEEDS USING THE WHITEBOARD METHODOLOGY

Assignment - Rapport building

Part 1 - write down all the ways you could build rapport / connection with your prospect or client - before / during and after your call or meeting.

---

## *Building Great Rapport*

***Before:***

***During:***

***After:***

***Question: what % of connection is built with the way you use your physiology?***

# UNCOVERING NEEDS USING THE WHITEBOARD METHODOLOGY

**Assignment - Rapport building**

**Part 2 - pick 2 situations, one personal and one business, where you focus on how the person you are connecting with is speaking and their physiology.**

**How quickly are they speaking ? How loud ? Try and match the way they speak.**

**How are they using their body? How are they sitting / standing ? Where are their arms, their legs, where are they looking ?**

---

***Building Great Rapport***

***What did you learn?***

***Personal Notes:***

***Business Notes:***

# UNCOVERING NEEDS USING THE WHITEBOARD METHODOLOGY

The purpose of these next few worksheets is to allow you to build your Whiteboard for your product or service. This will enable you to think of the great questions you want to ask as you help your prospect or client develop their whiteboard.

Use the space below to start drawing your picture as you answer the questions on the following sheets

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***Building Your Whiteboard***  
***Start drawing below:***

# UNCOVERING NEEDS USING THE WHITEBOARD METHODOLOGY

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Use the space below to start answering questions asked.

---

## *The Goal*

*What is the outcome your prospect or customer is hoping to achieve when they purchase your product or service ?*

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Use the space below to start answering questions asked.

---

## *The Drivers*

*What are all the reasons "why" that someone has bought your product or service in the past ?*

*What personal and what business reasons why?*

*What are the benefits they are expecting to see ?*

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Use the space below to start answering questions asked.

---

## *The Challenges*

*What might be preventing your prospect or customer from achieving their goal today ?*

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Use the space below to start answering questions asked.

---

## *Example Customer Stories*

*What examples do you have of customers who have benefited from your product service and seen real business value ?*

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Use the space below to start answering questions asked.

---

## *Your Solution*

*What are the steps in your solution ?*

*What are you going to do for them ?*

*What's the journey you are going to take them on ?*

*What are your key uniques ?*



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Use the space below to start answering questions asked.

---

## *The Success Factors*

*What are the key elements or principles about your product or service ?*

*What the things that make your product or service special ?*

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