2 Year Shift Now Sales Operating System (SOS) Course Outline

The Shift Now SALES OPERATING SYSTEM (SOS) takes a holistic approach to helping entrepreneurial companies achieve their sales and profit objectives.

The system is backed by over 25 years of research and experience and embraces many of the sales concepts, practices, processes, principles, and disciplines that have proven successful over decades of business changes and industry disruptions.

The system is designed to help entrepreneurial companies achieve three things:

CUSTOMER FOCUS AND INTIMACY™. Because the system is built for entrepreneurial companies to make the shift from simply 'selling products' to building deep insights with customers.

CLARITY AND ACTION™. Because we facilitate the right mix of simple concepts, proven practices, and practical tools to move from strategic, marketing and sales confusion, to clarity and to disciplined action.

FAST-LASTING™ RESULTS. Because our SHIFT Activators™ are thought leaders, real go-to people, who can guide, facilitate, and train to turn great ideas into real results.

In year one of two, there are thirty-six specific tools in the SOS which are covered in 10 class-room setting courses. Each course is designed to help the individual and the company to understand the importance of each tool and to master the use of each tool. And, there is one Quarterly Pulsing Session and one Annual Pulsing Session to review and reinforce the tools learned while ensuring full execution of the Sales Operating System.

In year two of two, there are three Quarterly Pulsing Sessions and one Annual Pulsing Session where we introduce 4 additional 'advanced' sales tools and ensure mastery and full implementation of all 40 tools in the system.

Courses

Course Name	Course Code	Instructor	Type of instruction	Hours	Cost per person
FOCUS - DAY 1 This introductory course sets the foundation for the entire sales operating system. The participants will learn how to shift their sales centre of gravity by understanding and then creating awareness and alignment with their customers' needs and values. First, you will complete a **company assessment** of the strengths, weaknesses, and core competencies to provide clarity and focus for futures sales activities. Second, you will **define your target markets and discover your unique identity** as an organization to be able to express it in a simple and compelling way.	F0105	Daryl Mack Justo Soto	Classroom	10	$825.00

Third, you will complete an exercise **to qualify customers based on their demographic, geographic and psychographic profiles** so that you are able to know every customer and personalize every sales touch point. Fourth, you will complete an **analysis of your primary competitors** – what are they offering, what are their strengths and what strategies, and tactics will enable us to take advantage of their weaknesses. Fifth, you will complete an **internal analysis of your current business**: revenue history, profitability history, customer history, current strategies, current sales and marketing tactics in order to form a baseline for future success. **Course Objectives** After completing the course, participants will have: • Completed five detailed exercises with the help of a facilitator/coach. • Learned about their CURRENT markets, customers, and competitors. • Created Five foundational documents summarizing our current situation.					
FOCUS - DAY 2 This course continues to set the foundation for the entire sales operating system. First, you will complete a market segment evaluation **of each of the primary and secondary target markets** in order to assess their potential and then define your recommended market strategy for execution. Second, you will complete an assessment of **each of the primary and secondary competitors** relative to the markets' needs and then define your competitive strategy for each competitor for execution. Third, you will learn how to execute an **opportunity analysis and business review**, for **each of your current and prospective customers** in order to execute specific account management plans and tactics. Fourth, you will complete an exercise to define the **company's long-term goals and overall marketing strategy** for the current year. Fifth, you will **develop and then deploy a 60 day plan** to accomplish two things; create some immediate traction and results and validate that you are in alignment with the marketplace and the customers' needs and wants. **Course Objectives** After completing the course, participants will have:	F0610	Daryl Mack Justo Soto	Classroom	10	$825.00

• Completed five more detailed exercises with the help of a facilitator/coach. • Learned and begun implementation of 5 foundational tools to execute on a well-defined strategy.					
PREDICT – DAY 1 In this course, you will learn to create both a market segment number system and a product/service numbering system in order to create a strategic priority marketing matrix. In addition, you will create a pricing system matrix. Finally, you will create a **comprehensive annual sales forecast** which incorporates the information above. **Course Objectives** After completing this course, participants will have: • Created an annual sales forecast.	P0105	Daryl Mack Justo Soto	Classroom	10	$825.00
PREDICT – DAY 2 In this course, you will create a sales forecast tracking tool along with a sales scorecard in order to track results compared to the annual sales plan. And, then, you will complete an exercise to determine a **three-year picture, a 1-year plan and quarterly priorities, called Rocks,** in order to bring the vision of the organization down to the ground for successful execution of the annual sales plan. **Course Objectives** After completing this course, participants will have: • Established an annual sales plan. • Established a clear vision for the next three years. • Established a clear 1-year plan and quarterly priorities to achieve the vision.	P0608	Daryl Mack Justo Soto	Classroom	10	$825.00
ENABLE – DAY 1 In this course, you will create a strategic plan to summarize: who the company is, where it is going, where it wants to go, what strategies will be used to execute, how you are going to market/sell to your primary target markets; how you are going to measure progress along the way.	EN01	Daryl Mack Justo Soto	Classroom	10	$825.00

Course Objectives After completing the session participants will have: • A clear vision, all on the same page. • A clear plan for the next year.					
ENABLE – DAY 2 This course continues to build on the strategic plan by creating and helping you execute annual and quarterly sales and marketing plans, with clearly defined actions steps and proven processes, to get results. **Course Objectives** After completing the course participants will have: • Annual Sales and Marketing Plan - a clear picture of where they are planning to go and how they will get there with their sales and marketing efforts. • Sales and Marketing Schedule and Budget – a simple tools to crystallize the schedule and budget. • Quarterly Sales and Marketing Plan – another simple tool to identify tactical plans, by market segment, and drive discipline and accountability.	EN0203	Daryl Mack Justo Soto	Class Room	10	$825.00
EXECUTION – DAY 1 In this foundational course participants will learn how to understand their own behavior styles and then learn how to modify their communication approach in order to improve business relationships and increase results. First, you will complete an exercise to determine your primary and secondary behaviors styles: driver, expressive, amiable, or analytical. Second, you will learn about the primary characteristics of each of the four behavior styles so that you can modify your approach with others. Third, you will learn how to create an action plan for each behavior style. Fourth, you will complete an exercise and roll-play session to understand how to modify your sales process for each behavior style. **Course Objectives** After completing the course participants will have:	EXO1	Daryl Mack Justo Soto	Class Room	10	$825.00

• Established a foundational tool to be able to bring the rest of the Execution Phase of the sales operating system to life.					
EXECUTION – DAY 2 In this course participants will learn four specific sales tools. First, you will complete and exercise to learn how to prospect because your organization's business success is driven by prospecting to successfully target, qualify and close business opportunities. Second, you will learn how to create a sales call plan based on the customer's sales phase. Third, you will learn how to create a pre-call planning worksheet so that you have a plan before each sales call. Fourth, you will learn the six key components of our sales methodology that will guide you in each of the six steps in a sales call. The six key components of our sales methodology are: Learn Connect Engage Explore Solution Optimize **Course Objectives** After completing the course participants will have: • Learned how to prospect and find new customers. • Established a proven process for planning sales calls. • A clear picture of the six key processes in a sales call.	EX0205	Daryl Mack Justo Soto	Classroom	10	$825.00
EXECUTION – DAY 3 In this course, will introduce the first component of the sales methodology, the LEARN STAGE. You will learn how to create a strategic account management plan and complete an exercise reinforce and master the tool. Next, you will learn the CONNECT STAGE of the sales methodology by completing an exercise to build bonding and rapport with clients.	EX05AE	Daryl Mack Justo Soto	Classroom	10	$825.00

Third, you will strengthen the CONNECT STAGE of the sales methodology by learning how to modify your behavior style to build rapport. Fourth, you will learn the ENGAGE STAGE of the sales methodology by completing an exercise to create and communicate your objectives and an agenda in each sales call. Fifth, you will learn to how to identify customers' needs, pricing/budget and their decision-making process in the EXPLORE STAGE of the sales methodology. **Course Objectives** After completing the course participants will have: • Learned and begun to master the first four components of the sales methodology.					
EXECUTION – DAY 4 In this course, we will complete the training and reinforcement of the sales methodology. First, we will strengthen the EXPLORE STAGE by introducing advanced questioning techniques to be used in a sales call. Second, you will complete an exercise to determine 'wins' for your clients which are customized to their particular roles in the company. Third, you will learn how to maximize your presentation skills when you are presenting in the SOLUTION STAGE of a sales call. Fourth, you will learn how to maintain and grow your business in the OPTIMIZE STAGE of your journey with your customers. **Course Objectives** After completing the course participants will have: • Learned and begun to master the last two components of the sales methodology.	EX05FJ	Daryl Mack Justo Soto	Classroom	10	$825.00
ACCELERATION – DAY 1 We have now completed the four sessions in the EXECUTION mode where you have learned and begun to master sales tools, sales methodologies, strategic account management skills, presentation skills and other disciplines to bring the entire Sales Operating System to life.	AQP1	Daryl Mack Justo Soto	Classroom	10	$825.00

From here, we move into full-on mode or the ACCELERATION PHASE of the SOS which comprises 1 full day session every quarter and 1 full day session every year to help sustain and accelerate things by helping you master the tools and disciplines you have learned along the journey. In this QUARTERLY PULSING session, you will: First, review your prior quarter to assess your level of mastery of the 36 tools and identify any gaps. Second, review all five tools presented in FOCUS - DAY 1 and make any necessary changes to the documents. Third, review all five tools presented in FOCUS - DAY 2 and make any necessary changes to the documents. Fourth, review all five tools presented in PREDICT - DAY 1 and make any necessary changes to the documents. Fifth, review all three tools presented in PREDICT – DAY 2 and make any necessary changes to the documents. Sixth, review the strategic plan presented in ENABLE – DAY 1 and make any necessary changes to the documents. Seventh, review all two tools presented in ENABLE – DAY 2 and make any necessary changes to the documents. **Course Objectives** After completing the course participants will have: • Reached another level of mastery of the foundational tools. • A clear plan for execution of the SOS.					
ACCELERATION – DAY 2 In this QUARTERLY PULSING session, you will: First, create a new quarterly sales and marketing plan. Second, review all five tools presented in FOCUS - DAY 1 and make any necessary changes to the documents. Third, review all five tools presented in FOCUS - DAY 2 and make any necessary changes to the documents. Fourth, review all five tools presented in PREDICT - DAY 1 and make any necessary changes to the documents.	AQP2	Daryl Mack Justo Soto	Classroom	10	$825.00

Fifth, review all three tools presented in PREDICT – DAY 2 and make any necessary changes to the documents. Sixth, review the strategic plan presented in ENABLE – DAY 1 and make any necessary changes to the documents. Seventh, review all two tools presented in ENABLE – DAY 2 and make any necessary changes to the documents. Eighth, complete additional exercises to reinforce and strengthen the six key components of the sales methodology. **Course Objectives** After completing the course participants will have: • Reached another level of mastery of the foundational tools. • A clear plan for execution of the SOS.					
ACCELERATION – DAY 3 In this QUARTERLY PULSING session, you will: First, create a new quarterly sales and marketing plan. Second, review all five tools presented in FOCUS - DAY 1 and make any necessary changes to the documents. Third, review all five tools presented in FOCUS - DAY 2 and make any necessary changes to the documents. Fourth, review all five tools presented in PREDICT - DAY 1 and make any necessary changes to the documents. Fifth, review all three tools presented in PREDICT – DAY 2 and make any necessary changes to the documents. Sixth, review the strategic plan presented in ENABLE – DAY 1 and make any necessary changes to the documents. Seventh, review all two tools presented in ENABLE – DAY 2 and make any necessary changes to the documents. Eighth, complete additional exercises to reinforce and strengthen the six key components of the sales methodology. **Course Objectives** After completing the course participants will have: • Reached another level of mastery of the foundational tools.	AQP3	Daryl Mack Justo Soto	Classroom	10	$825.00

• A clear plan for execution of the SOS.					
ACCELERATION – DAY 4 In this QUARTERLY PULSING session, you will: First, create a new quarterly sales and marketing plan. Second, review all five tools presented in FOCUS - DAY 1 and make any necessary changes to the documents. Third, review all five tools presented in FOCUS - DAY 2 and make any necessary changes to the documents. Fourth, review all five tools presented in PREDICT - DAY 1 and make any necessary changes to the documents. Fifth, review all three tools presented in PREDICT – DAY 2 and make any necessary changes to the documents. Sixth, review the strategic plan presented in ENABLE – DAY 1 and make any necessary changes to the documents. Seventh, review all two tools presented in ENABLE – DAY 2 and make any necessary changes to the documents. Eighth, complete additional exercises to reinforce and strengthen the six key components of the sales methodology. **Course Objectives** After completing the course participants will have: • Reached another level of mastery of the foundational tools. • A clear plan for execution of the SOS.	AQP4	Daryl Mack Justo Soto	Classroom	10	$825.00
ACCELERATION – DAY 5 The ACCELERATION PHASE of the SOS which comprises 1 full day session every quarter (Quarterly Pulse) and 1 full day session every year (Annual Pulse) to help sustain and accelerate things by helping you master the tools and disciplines you have learned along the journey. In this ANNUAL PULSING session, you will: First, review the annual sales forecast and make any adjustments for the following year.	AAP1	Daryl Mack Justo Soto	Classroom	10	$825.00

Second, review the annual sales and marketing plan to make any adjustments for the following year. Third, create a new quarterly sales and marketing plan. **Course Objectives** After completing the course participants will have: • A clear forecast and plans for the upcoming year and quarter.					
ACCELERATION – DAY 6 The ACCELERATION PHASE of the SOS which comprises 1 full day session every quarter (Quarterly Pulse) and 1 full day session every year (Annual Pulse) to help sustain and accelerate things by helping you master the tools and disciplines you have learned along the journey. In this ANNUAL PULSING session, you will: First, review the annual sales forecast and make any adjustments for the following year. Second, review the annual sales and marketing plan to make any adjustments for the following year. Third, create a new quarterly sales and marketing plan. **Course Objectives** After completing the course participants will have: • A clear forecast and plans for the upcoming year and quarter.	AAP2	Daryl Mack Justo Soto	Classroom	10	$825.00

CAJG Information and Links

The Canada-Alberta Job Grant ("CAJG") involves three steps: application, reimbursement, and completion.

The following information will assist you in submitting the application portion for the CAJG.

CAJG Applicant Guide: https://www.alberta.ca/assets/documents/CAJG-applicant-guide.pdf

You may need to register for a MyAlberta Digital ID for Business Account at: https://cajg-step.labour.alberta.ca/SignIn?ReturnUrl=%2F

Once you have your ID, you can login to the Grants Portal at https://cajg-step.labour.alberta.ca/SignIn?ReturnUrl=%2F to complete your application.

We provide you with an estimate which you will need to send along with the application.

We also provide you with this 2 Year Shift Now Sales Operating System (SOS) Course Outline which lists the session names and codes for each session.

It is important that you submit the application a minimum of 30 days before your session's start date which must start within six months from the date of approval.

Please note that CAJG will not fund training sessions that start before you receive CAJG approval.