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Finding out what's important (to clients & staff)

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What we will cover

- Why is this topic useful for you? Why are you here?
- What are 'Values'?
- How you can use them
- Exercise
- Other tips



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Why is this topic so useful?

- Selling (People 'buy' people and what they can do for them)
- Managing/motivating people
- Making choices (e.g. recruitment, career next steps)
- Team building
- Understanding clients'/colleagues' motivation
- Coaching



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An overview of human beings

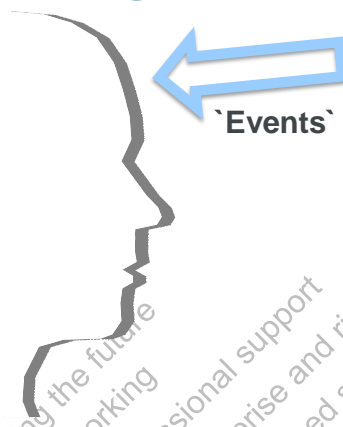


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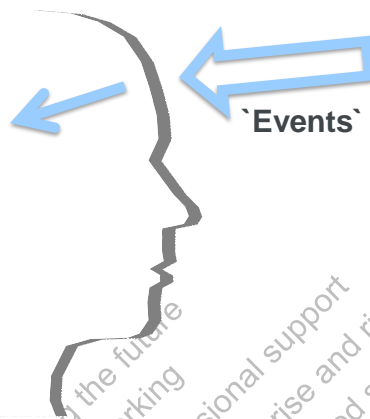
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An overview of human beings

Filter:



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An overview of human beings

Thoughts
& Feelings

Filter:

'Events'



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Filters:

'Events'

ACTIONS &
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**ACTIONS &
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Values

Some definitions:

- What's important to us, what we want or look for
- The things we move towards having/avoid not having
- Leads/causes us to 'judge' our or other people's behaviours

Examples of 'Values':

Work: variety; challenge; development; fun.

Actuarial services: approachable; responsive; clear.



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Finding out someone's Values

3 steps:

1. Initial questions

- i) Ask, "What's important to you about ____?", or 'What are you looking for/what do you want from a ____?'"
- ii) If you had all these in a ____, would you want it or is anything missing?"

2. Rank. 1-8 or A (essential)/B (very important)/C (icing)

3. Test. i) 5-8 or 1-4. (B&Cs or A&Bs). ii) Overall.



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Some tips when eliciting Values

- Stick to the script/process (N.B. use common sense)
- Use the client's/colleague's words
- Don't engage in a conversation – find out the Values
- Don't suggest Values – be curious (you want to know their Values)



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Exercise

- Pairs. Questioner and responder
- Questioner chooses whether they want to practice as a 'manager' or as a 'seller'. Responder complies.
- Follow the process, finding out what's important to the person about their career/work or what they're looking for in the goods/services they want to buy.
- 1 minute feedback from Responder
- Swap and repeat. **x minutes in total**



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Questions, learnings, action points



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'Criteria Equivalents'

i.e. The equivalent of the Value, what it means.

- Drill down to discover what the Values actually mean to the client/colleague once they have ranked them
- e.g. "How do you know when someone *respects* you?" or "What has to happen for you to feel *challenged*?"



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Questions?

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- Coaching
- Training: Communication, management and presentation skills
- Books & e-books
- Audio & visual learning



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