

MASTER THE ART OF HIGHLY EFFECTIVE BUSINESS PARTNERING

RELEVANT, INSPIRING, & ACTIONABLE
PROFESSIONAL DEVELOPMENT

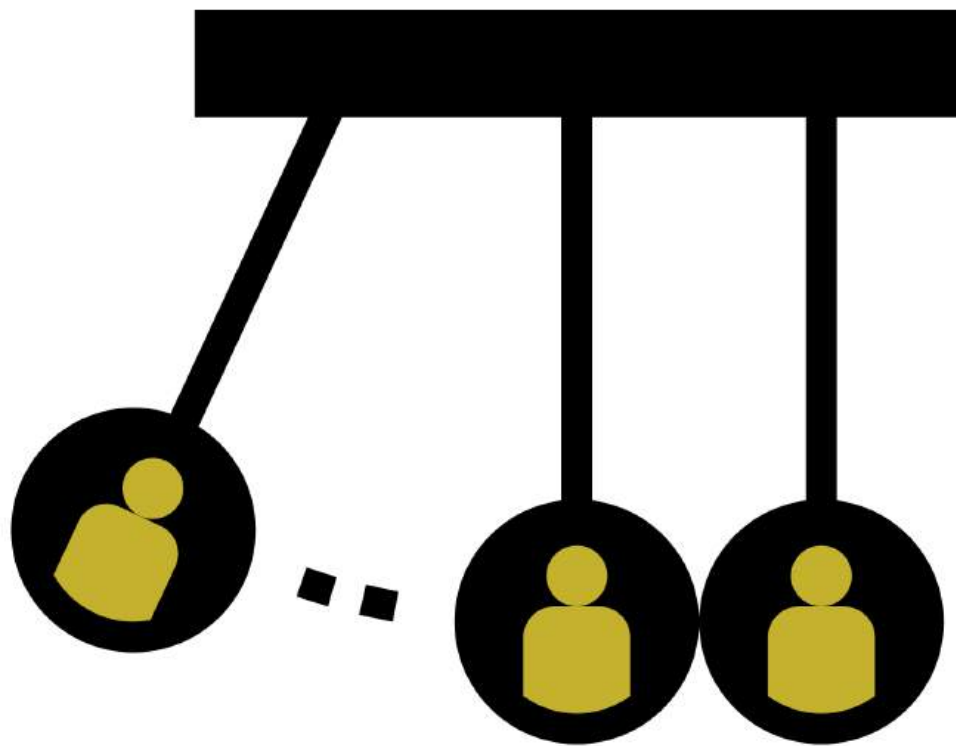
(That actually sticks.)



FUNDAMENTALS

MASTER THE ART OF BUSINESS PARTNERING

ENSURE PARTNERS SEE THE **R.E.A.L.** YOU



Influence is the process of developing loyal, long-term relationships with members of different business teams. We know these partnerships seek and create beneficial solutions for business challenges. The question is, how do we live it out in a meaningful way?

Focus on the Fundamentals

RESONATE: On a & level

ELEVATE: Awareness of team &

ACTIVATE: through

LIBERATE: Limiting to increase

RESONATE

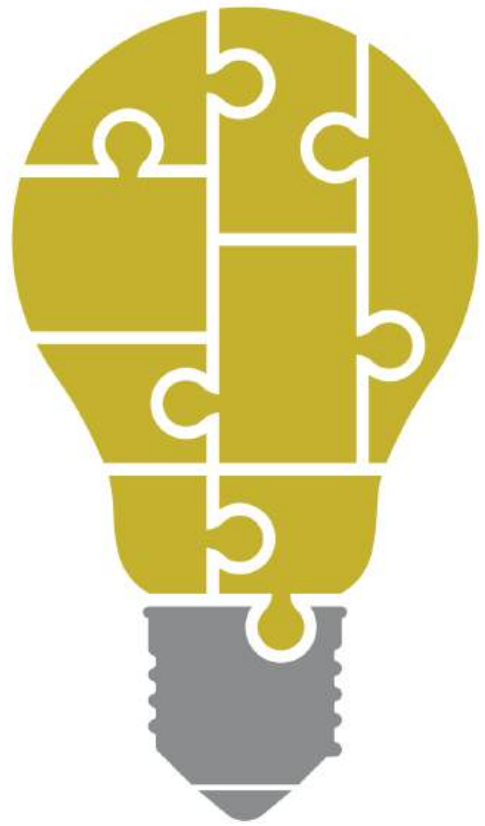
ON A **PROFESSIONAL**
& **PERSONAL** LEVEL



Speak the
VALUE LANGUAGE
of your partner

EDUCATE

USING **STORIES**
AND **ANALOGIES**



ACTIVATE

BUY-IN THROUGH
LISTENING



LIBERATE

LIMITING **BELIEFS**
TO INCREASE **IMPACT**



POLLING QUESTION



Question: When it comes to getting R.E.A.L., what opportunity area are you most interested in?

- a. Resonating (Deepening Relationships).
- b. Educating (Enhancing Understanding).
- c. Activating (Building buy-in).
- d. Liberating (Gaining Self-Confidence).



AGENDA



**GIVE
YOURSELF A
GIFT**

PERCEPTION



MISPERCEPTION



SHIFT PERCEPTION

1. How are finance professionals **typically viewed**?
2. How do you **want to be viewed** as business partners?



What will it
take
to **BRIDGE**
the **GAP**?

“**RESIST** the motto:

‘First say **NO.**”

Finance Pro Colleague

“Rather than ‘no’
provide **OPTIONS** for
moving **FORWARD**”

Finance Pro Colleague

R.E.A.L. INFLUENCERS: RESONATE

ON A **PROFESSIONAL** & **PERSONAL** LEVEL



Speak the
VALUE LANGUAGE
of your partner

In order to resonate, you have to realize you're in sales. Different partners value different things which means your communication has to be customized if you want your ideas to have impact. Relevance + Relatability = Resonance. Let's dive in.

“It’s not so much about knowing **FINANCE**. That’s what I went to school for. Our most important job is having **MEANINGFUL** interactions.”

Finance Pro Colleague



What
business
are
you in



“We are not in the
COFFEE BUSINESS”

“We are not in the
COFFEE BUSINESS
serving people.
We are in the
PEOPLE BUSINESS
serving coffee.”

Howard Schultz

“**RELATIONSHIPS** are the most
IMPORTANT thing in business...period.”

Finance Pro Colleague



Know Your Audience:

- * Who are they?
- * What's on their mind?
- * What challenges are they facing?
- * What opportunities are they chasing?
- * What words/terminology get their attention?
- * What jargon should be avoided?

VALUE

SPEAK

their value language

“We’re **SERVICE PROVIDERS**
and need to know what our
‘CUSTOMERS’ need and
provide that for them.”

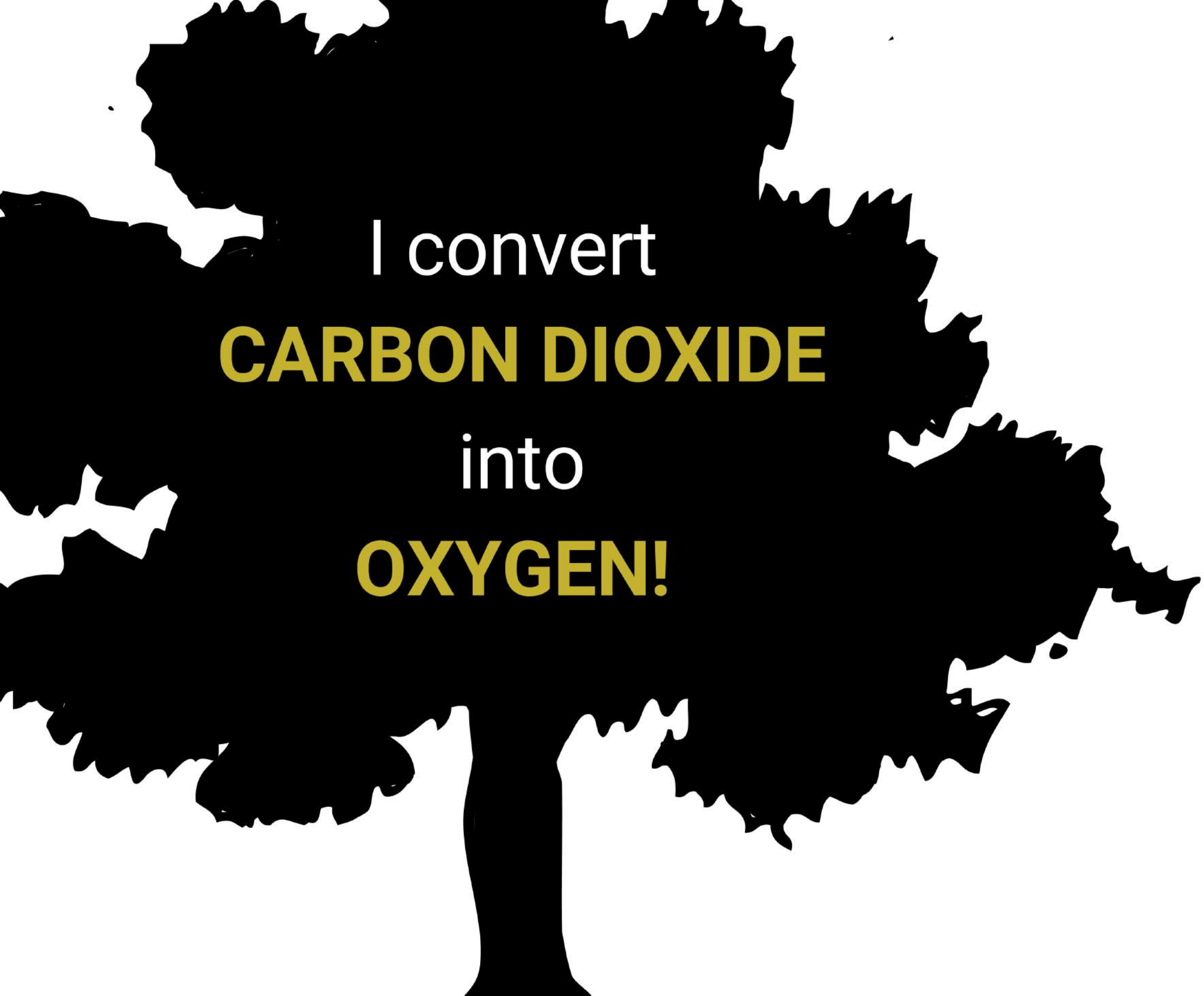
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BUSINESS PARTNER

THEIR NEED/DESIRE

YOUR UNIQUE VALUE





I convert
CARBON DIOXIDE
into
OXYGEN!



BUSINESS PARTNER

THEIR NEED/DESIRE

YOUR UNIQUE VALUE



BUSINESS PARTNER

THEIR NEED/DESIRE

YOUR UNIQUE VALUE



POLLING QUESTION



Question: From your perspective, what's a key benefit of speaking the value language of your business partners?

- a. Getting invited to have a "seat at the table".
- b. Being viewed as a value-add teammate.
- c. Having others understand how you can help them.
- d. Moving insight to meaningful action.

MAKE IT
PERSONAL

“Business is **BETTER**
when it's **PERSONAL**”

Finance Pro Colleague

Make it Personal

Factual Questions: Typical conversation starters

- Where are you from originally?
- What kind of activities were you involved in growing up?
- Where did you go to school?
- Tell me about your first job.
- How long have you worked here?
- Tell me about your family.
- What energizes you in your spare time?

Causative Questions: Uncover the motives behind the facts

- Why did you choose the college you went to?
- What caused you to become interested in your major?
- What inspired you to pursue this profession?
- What led you to work there/here?
- What brings your family together?

People are
INTERESTING
when you become
INTERESTED

POLLING QUESTION



- Question:** What holds you back from building deeper relationships with business partners?
- a. Not wanting to come off as unprofessional.
 - b. Desire to keep work life and personal life separate.
 - c. Lack of time.
 - d. Not knowing where/how to start.

BASED ON WHAT YOU LEARNED

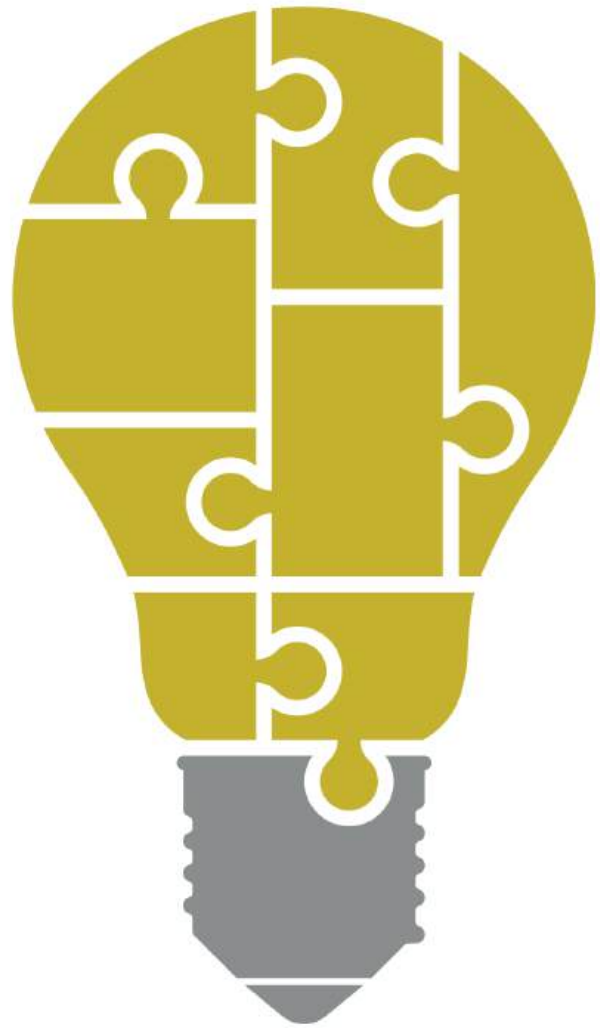
How could you be a better partner?

“We don't have **ENOUGH**
people and need to
COLLABORATE to get
things done.”

Finance Pro Colleague

R.E.A.L. INFLUENCERS: EDUCATE

USING **STORIES** & **ANALOGIES**

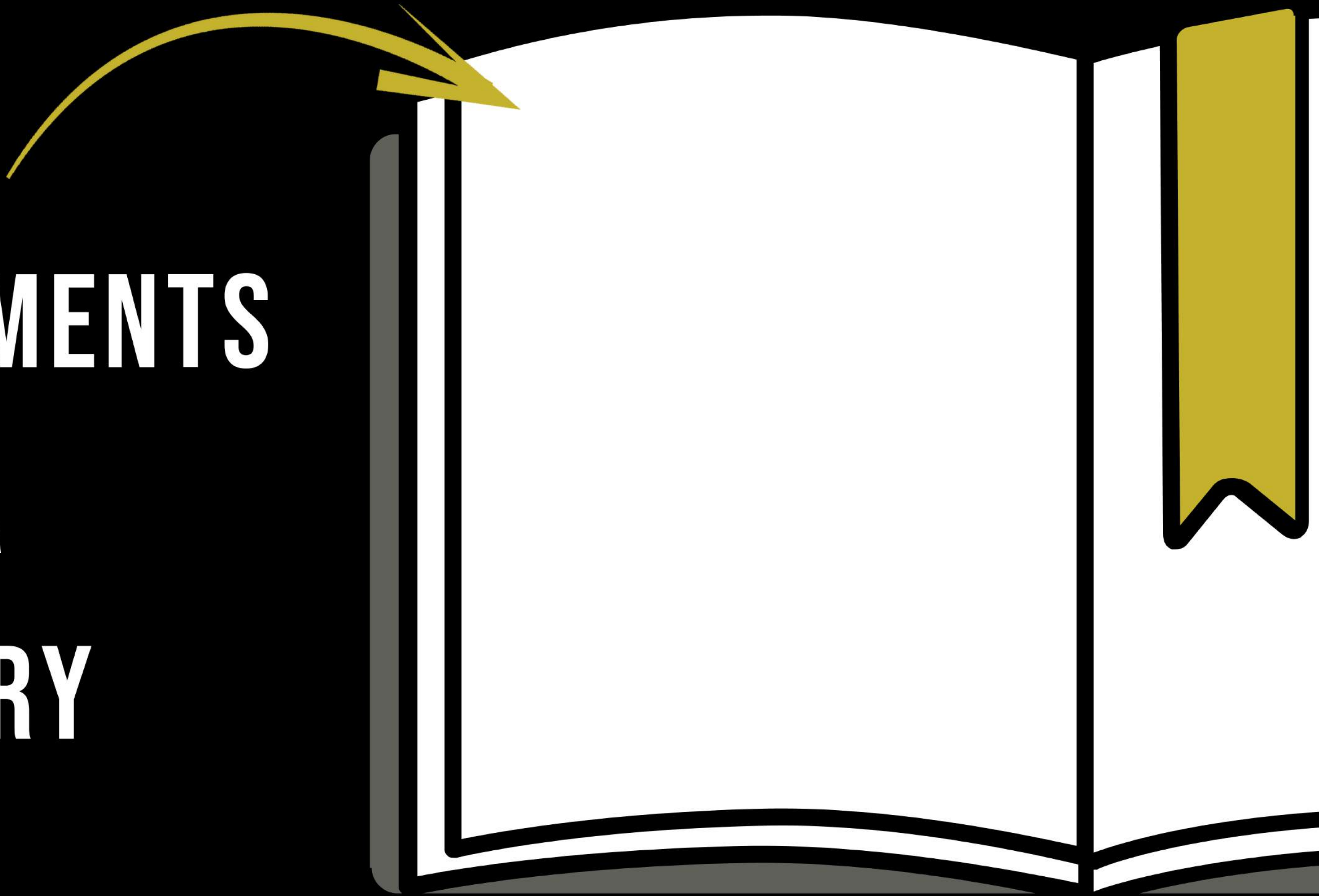


Your niche may be your native tongue, but you have to be fluent in the broader needs of the business. Translate your expertise by making foreign concepts feel familiar. Partners will remember your insight when you make it memorable. Be a generator of “aha” moments.

STORY is **DATA**
with a **SOUL.**

BRENE BROWN

**THE
ELEMENTS
OF A
STORY**



THE ELEMENTS OF A STORY



1. Start

THE ELEMENTS OF A STORY

The image features a stylized illustration of an open book. The left page is blank, and the right page contains a numbered list. A yellow bookmark is visible on the right side of the book. A yellow arrow points from the top left towards the first item in the list. The background is black, and the text is in white and yellow.

1. Start

2. Begin with the incident

THE ELEMENTS OF A STORY

The image features a stylized illustration of an open book. The left page is black with white text. The right page is white with black text. A yellow bookmark is visible on the right page, and a yellow arrow points from the top left towards the first list item. The book is shown from a slightly elevated perspective, with the spine visible in the center.

1. Start

2. Begin with the incident

3. Involve the senses

THE ELEMENTS OF A STORY

The image features a stylized illustration of an open book. The left page is black with white text. The right page is white with black text. A yellow bookmark is visible on the right side of the book. A yellow arrow points from the top left towards the first item in the list on the right page.

- 1. Start**
- 2. Begin with the incident**
- 3. Involve the senses**
- 4. Keep it short**

THE ELEMENTS OF A STORY

The image features a stylized illustration of an open book. The left page is black with the title 'THE ELEMENTS OF A STORY' in large, white, bold, sans-serif capital letters. The right page is white and contains a numbered list of five items. A yellow arrow curves from the top left towards the first item, '1. Start'. A yellow bookmark is visible on the right side of the book. The book's spine is on the left, and the pages are slightly curved to show depth.

1. Start

2. Begin with the incident

3. Involve the senses

4. Keep it short

5. Bridge to relevance



Question: What is your biggest hesitation when it comes to business storytelling?

- a. Wasting time.
- b. Looking silly.
- c. Not being good at it.
- d. Lacking confidence.

COMPLEX CONCEPTS

COMPLEX CONCEPT



"AHA" ANALOGY



“AHA”

ANALOGY

R.E.A.L. INFLUENCERS: ACTIVATE

BUY-IN THROUGH LISTENING



Buy-in is front-loaded. As Dale Carnegie aptly said, "People support a world they help create." Guide your business partners toward better outcomes by asking skillful questions and listening intently. Simple questions are far more persuasive than complex answers.

QUESTIONS

?

RISKS VS. VALUE

“Sell your **CLEVERNESS** and
purchase **BEWILDERMENT.**”

Rumi

THE VALUE OF OUR DISCOVERY INTERVIEWS

- * **Interesting:** I didn't know what to expect.
- * **Reflective:** Gave me a minute to calm down and reflect on important things.
- * **Collaborative:** Asking questions and understanding my thoughts.
- * **Reflective:** Looking at my career and what I've done...
- * **Enjoyable:** Laid back and asking questions. Made it easy to talk.
- * **Easy:** Conversation flowed.

Regarding your goal,
what's going **WELL**?

Where are you
getting **STUCK?**

Moving forward,
what would **SUCCESS**
in your area look like?

DISPOSITION

Sincere

Thought-evoking

Willing to practice

DESIGN

Directional (yes/no)



Is, does, are

Dialogue (gain understanding)



What, how, why

DELIVERY

Tone & gestures

Brevity

One at a time

DIG DOWN

Tell me more about...

Why do you think that is?

How so?

What else?

POLLING QUESTION



Question: For you, what is the riskiest part of asking questions?

- a. Asking a “dumb” question.
- b. Receiving an unwanted answer.
- c. Awkward silence if no one speaks up.
- d. Opening a can of worms and derailing a meeting.

R.E.A.L. INFLUENCERS: LIBERATE

LIMITING **BELIEFS** TO INCREASE **IMPACT**



A belief is a thought you think over and over again. The question is, what limiting beliefs are you holding onto that are holding you back? Come out of agreement with old lies and take hold of new truths so you can unleash the power of your influence.

Make the Decision

- * What **lie/limiting belief** are you holding onto?
- * What **new truth** would you like to take hold of?
- * As a result, how will that impact your **influence** as a business partner?

POLLING QUESTION



Question: What will freeing yourself from old lies do for you?

- a. Add more self-confidence and self-belief.
- b. Allow you to fulfill your full potential.
- c. Give you the courage to expand your skill set.
- d. Ensure you deliver the greatest impact throughout your organization.

KNOWLEDGE IS



KNOWLEDGE IS

POWER



KNOWLEDGE IS

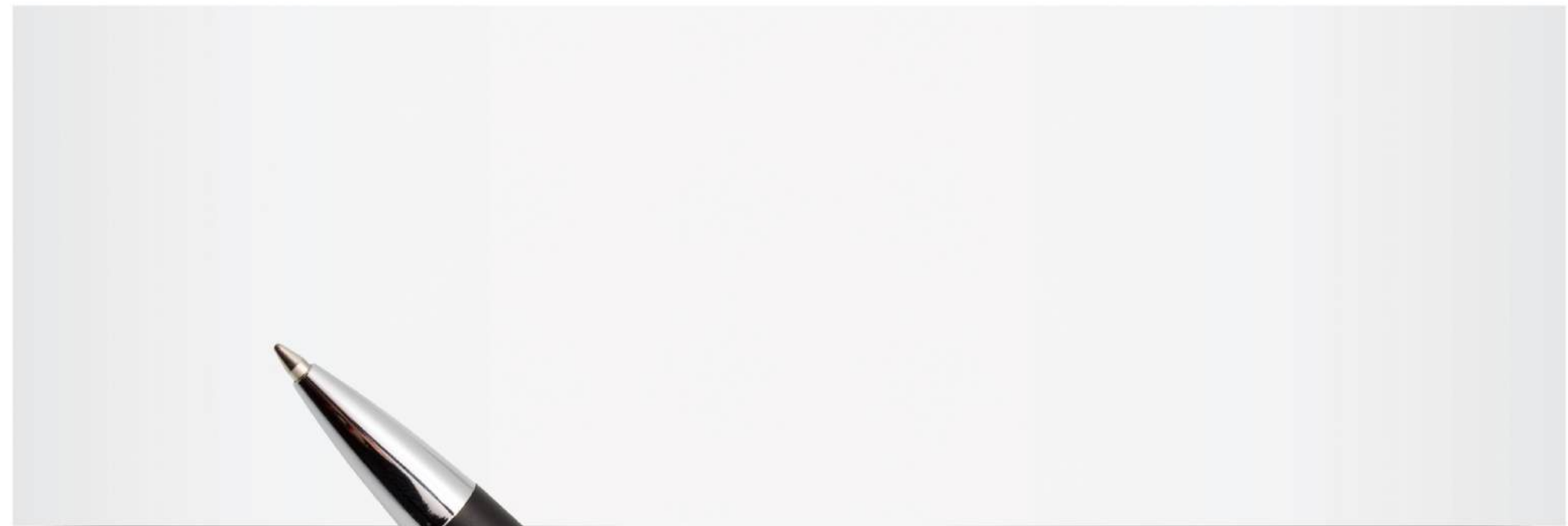
POWER



APPLICATION
IS POWER

TAKE THE WORKSHOP TO THE WORKPLACE

WHEN WE **FINISH** YOU **BEGIN**



Accountable to: *Myself.*

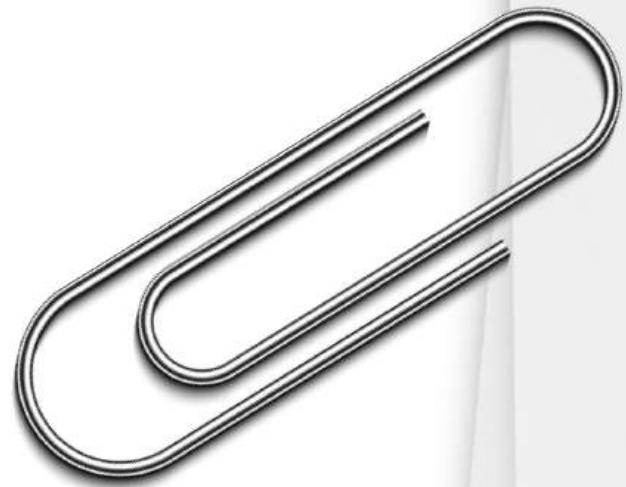
Clearly defined: *My first step is:*

.....

.....

Time specific: *I will report my progress on:*

.....





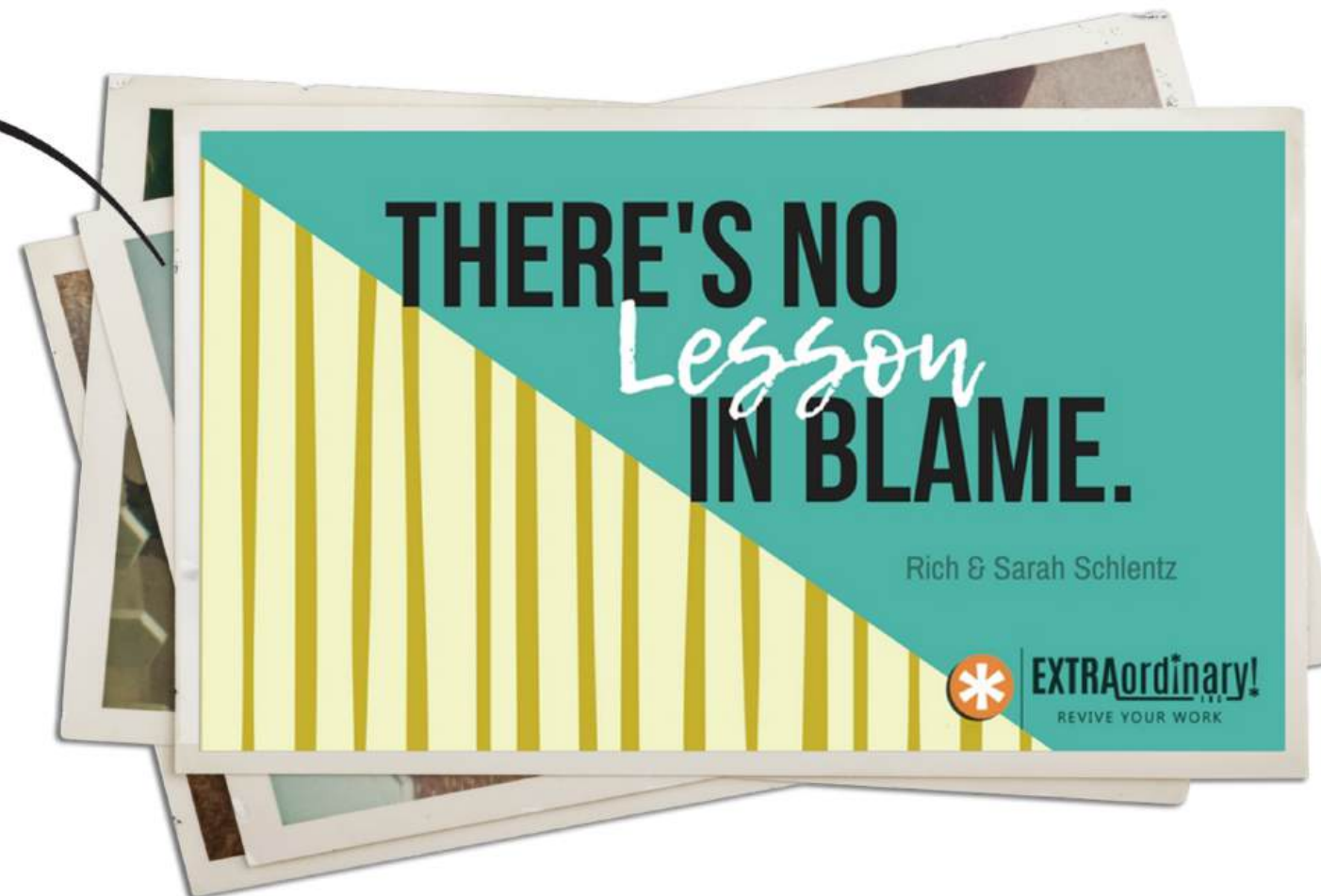
PODCAST

“Conversation that transcends the blurred lines between our **PERSONAL** and **PROFESSIONAL** lives.”



BLOG

“A quick dose of **INSPIRATION** for your **INBOX.**”





WHAT ONE WORD
BEST DESCRIBES THE

VALUE

OF OUR TIME
TOGETHER?

