Sales, Marketing & Negotiation Skills

(Tailor-made for BDO Staff)

INTRODUCTION

In professional services, every employee plays a role in shaping the client experience. Whether through meetings, emails, workshops, proposals, reports, or informal interactions, employees continuously influence how clients perceive professionalism, competence, and trust.

"Marketing, sales and negotiation" in this context are not about hard selling. They are about:

- Communicating expertise clearly
- Building credibility and trust
- Understanding client needs
- Contributing to stronger proposals and follow-ups
- Handling client requests professionally
- Protecting boundaries around scope, timelines, and expectations

This one-day interactive programme is designed specifically for employees in consulting and professional environments, equipping them with practical, day-to-day skills they can apply immediately in their roles.

The programme balances three essential capabilities:

- Marketing: How we present ourselves and build credibility
- Sales: How we structure conversations and move work forward
- Negotiation: How we handle pressure, scope changes, and expectations professionally

LEARNING OBJECTIVES

By the end of this one-day training, participants will be able to:

1. Understand how clients build trust and make decisions in professional services
2. Communicate their work and expertise clearly and confidently
3. Represent BDO professionally in meetings, emails, and proposals
4. Use a simple structure for effective client conversations
5. Ask better questions to clarify needs and expectations
6. Contribute to clearer, more client-friendly proposals
7. Handle common client pressure situations professionally:
   "Can you add this in?"
   "We assumed this was included"

“We need this urgently”
“Your competitor is cheaper”

8. Protect themselves and the firm from scope creep and misunderstandings
9. Use AI tools responsibly to improve productivity and communication quality
10. Leave with a practical personal action plan for immediate application
11. Use AI tools ethically and productively for everyday work tasks
12. Leave with a personal action plan for improvement

COURSE OUTLINE

Session 1 – The Professional Services Client Journey
(Setting the foundation)

- How employees contribute to marketing, sales and negotiation — even unintentionally
- The client journey: first impression → trust → engagement → delivery → long-term relationship
- What builds client confidence: clarity, consistency, professionalism
- Representing the BDO brand in every interaction

Activity:
Participants map where they personally interact with clients and influence perceptions.

Session 2 – Marketing for Employees: Credibility & Professional Positioning

This is not advertising, this is credibility marketing.

- Explaining what you do in clear, client-friendly language
- Avoiding jargon while maintaining professionalism
- Using proof to build trust:
    - Experience
    - Case examples
    - Outcomes
    - Methodology
- How employees contribute to BDO’s professional image through:
    - Emails

    - Conversations
    - Presentations
    - Online presence (optional awareness)

Activity:
Build a personal "credibility pack":

- 3 strengths
- 1 real example of impact
- 1 clear explanation of your role

Session 3 – Sales Skills for Employees: Structuring Better Client Conversations

Sales here means helping conversations progress professionally.

- A simple consultative conversation structure:
    - Opening
    - Understanding needs
    - Clarifying expectations
    - Responding appropriately
    - Agreeing next steps
- Asking stronger questions (a core professional skill)
- Avoiding common traps:
    - Free consulting
    - Vague commitments
    - Unclear follow-ups
- How to close meetings with clarity ("next steps" discipline)

Activity:
Client meeting role play (rotate roles: client / employee / observer)

Session 4 – Proposals, Emails & Follow-ups That Strengthen Trust

- Why proposals and emails often fail:
    - Too technical
    - Too long
    - Unclear scope
    - No clear value

- Writing more client-friendly content:
    - Outcomes instead of tasks
    - Clear scope
    - Clear deliverables
    - Clear assumptions
- Follow-up emails that move decisions forward (without sounding pushy)

Activity:
Rewrite a weak proposal paragraph into a clearer version
Draft a strong "next step" follow-up email

Session 5 – Negotiation Essentials for Employees (Scope, Timelines, Expectations)

This focuses on everyday professional negotiation, not aggressive bargaining.

- What negotiation really looks like in consulting roles
- Common employee-level negotiation situations:
    - Extra work requests
    - Urgent timelines
    - Assumed inclusions
    - Changing expectations
- A simple principle: Trade, don't give
- Professional boundary phrases:
    - "Yes, if…"
    - "That would be outside the current scope"
    - "Let's confirm assumptions before proceeding"
- Knowing when to handle and when to escalate

Activity:
Role play: Managing a scope change professionally

Session 6 – Handling Client Pressure & Objections Professionally

- How to respond to common situations:
    - "Can you include this?"
    - "We thought this was part of it"
    - "Your competitor is cheaper"
    - "We need flexibility"

- Staying calm and professional under pressure
- Framing responses using:
    - Effort
    - Risk
    - Impact
    - Governance
- Confirming outcomes clearly in writing to avoid future disputes

Activity:
Short objection-handling drills with feedback

Session 7 – AI for Marketing, Sales & Negotiation Productivity

Practical, ethical use of AI at work.

- Using AI to:
    - Improve email tone
    - Draft proposal wording
    - Summarise meetings
    - Prepare client questions
    - Draft professional responses to difficult situations
- What must never be shared (client confidentiality, sensitive data)
- AI as a support tool, not a replacement for judgment

Activity:
Participants build their own personal prompt pack:

- 2 prompts for communication
- 2 for client conversations
- 2 for difficult situations

Session 8 – Personal Action Plan & Commitments

Each participant defines:

- 1 improvement in how they present themselves (marketing)
- 1 improvement in client conversations (sales)
- 1 boundary phrase they will start using (negotiation)

Peer discussion and commitment

Key Tools & Frameworks Used in the Programme

1. Client Conversation Structure Guide
2. Question Bank for Client Discussions
3. Proposal & Email Clarity Checklist
4. Scope & Boundary Phrase Guide
5. Objection Handling Examples
6. AI Prompt Pack Template
7. Personal Action Plan

DURATION: 1 Day

TRAINER: Dr Ismael Essackjee