



The Stepping-Up Approach To Business Success

EXPERIENCING THE WINNING EDGE

By George Beshara

Author of Experiencing The Winning Edge

Executive Director G.O.L.E.A.D.

Montreal, Quebec, Canada”



G.O.L.E.A.D.
www.go-lead.org

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The Stepping-Up Approach To Business Success

EXPERIENCING THE WINNING EDGE *MODULE ONE* POSITIONING YOURSELF FOR SUCCESS IN THESE CHALLENGING TIMES

A Gift from G.O.L.E.A.D.

Montreal, Quebec, Canada



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- 5 Managing Your Time and Using Technology More Effectively.
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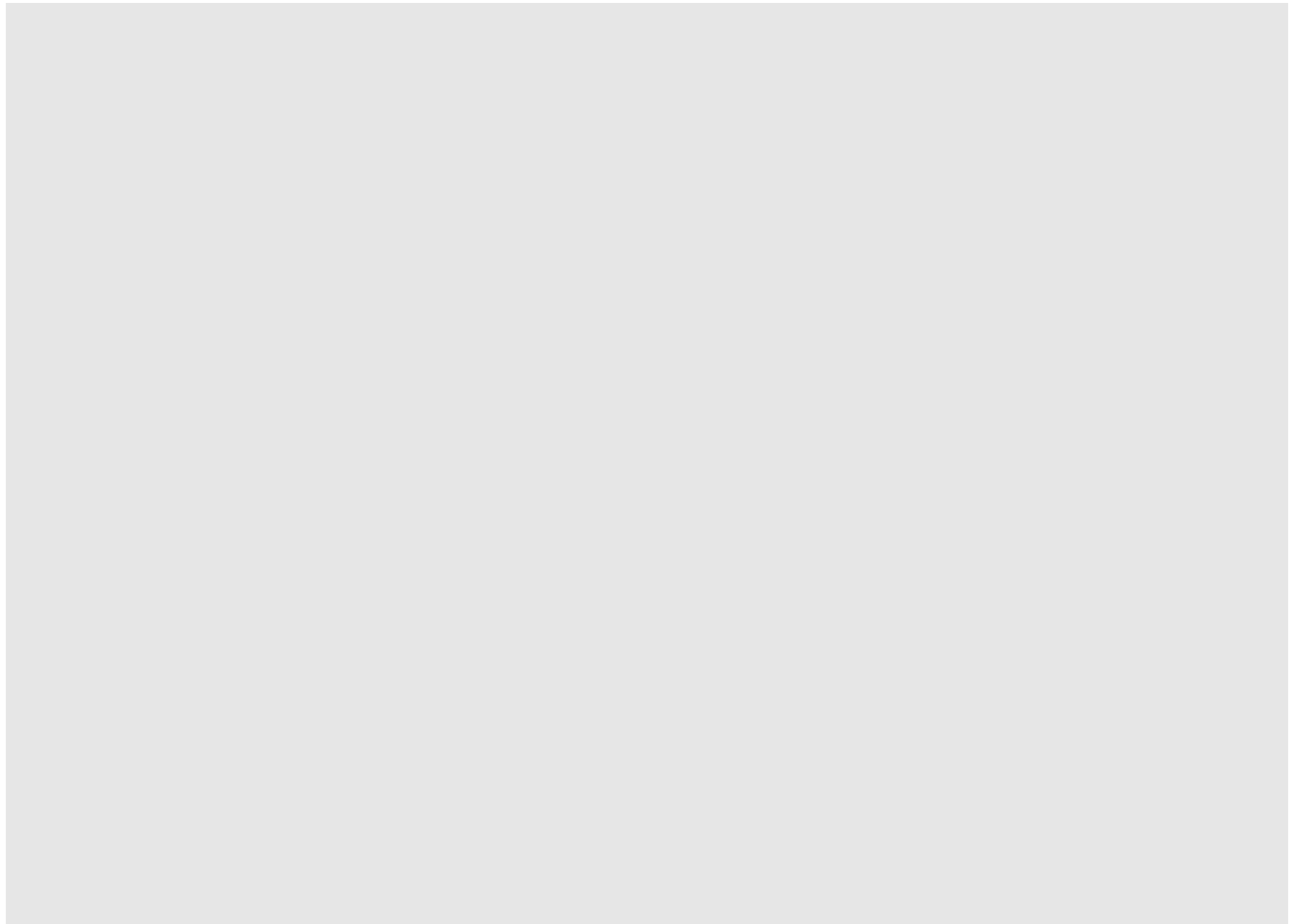
Objectives of Module One:

As a result of completing this Module, you should be prepared to answer the following questions:

- What are the main needs of clients today?
- What are the main changes that your clients have faced since the 1980's at work and in their personal lives?
- 3What do all these changes tell us about the behaviors and expectations of clients today?
- What are the challenges you and businesses are currently facing?

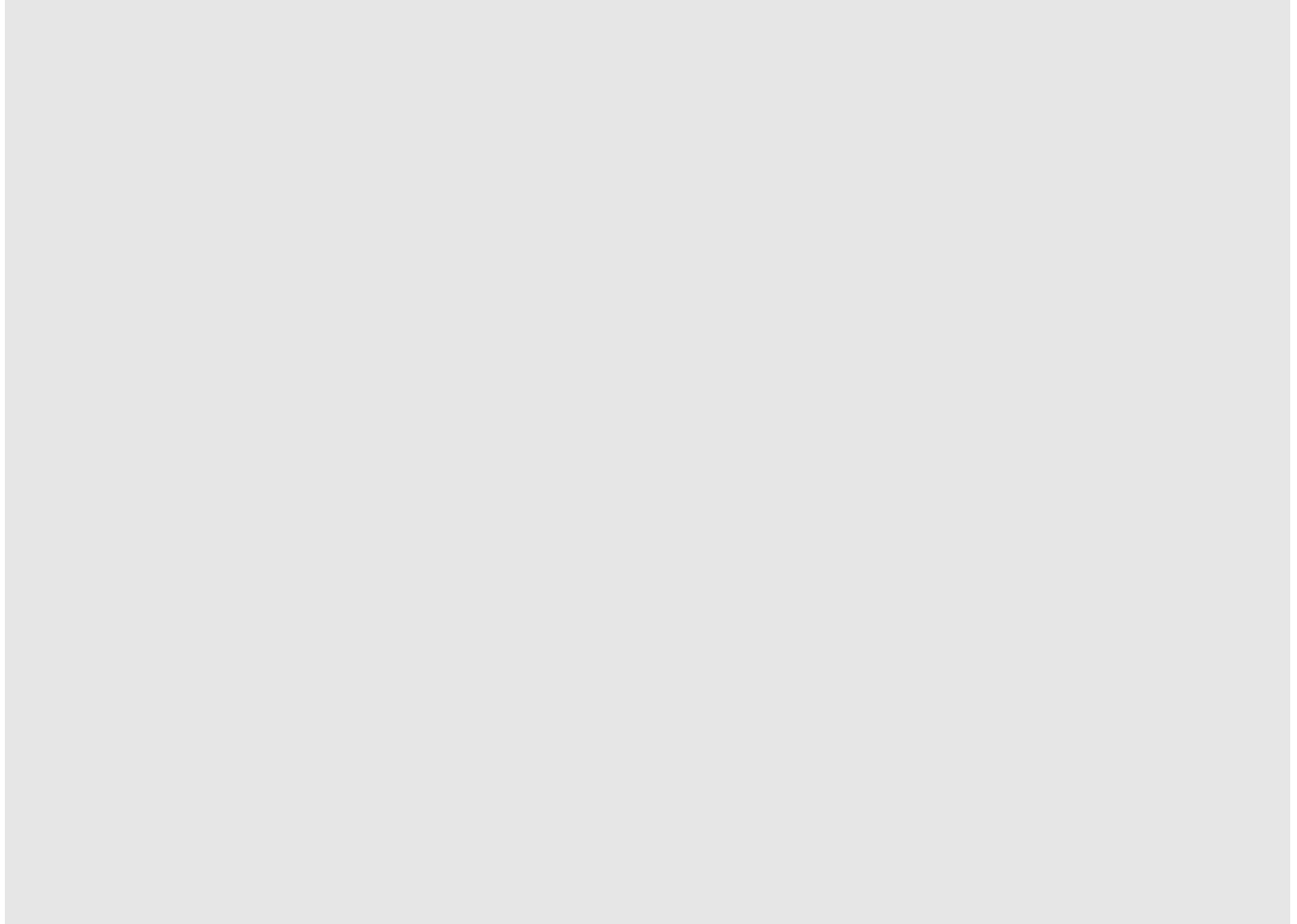
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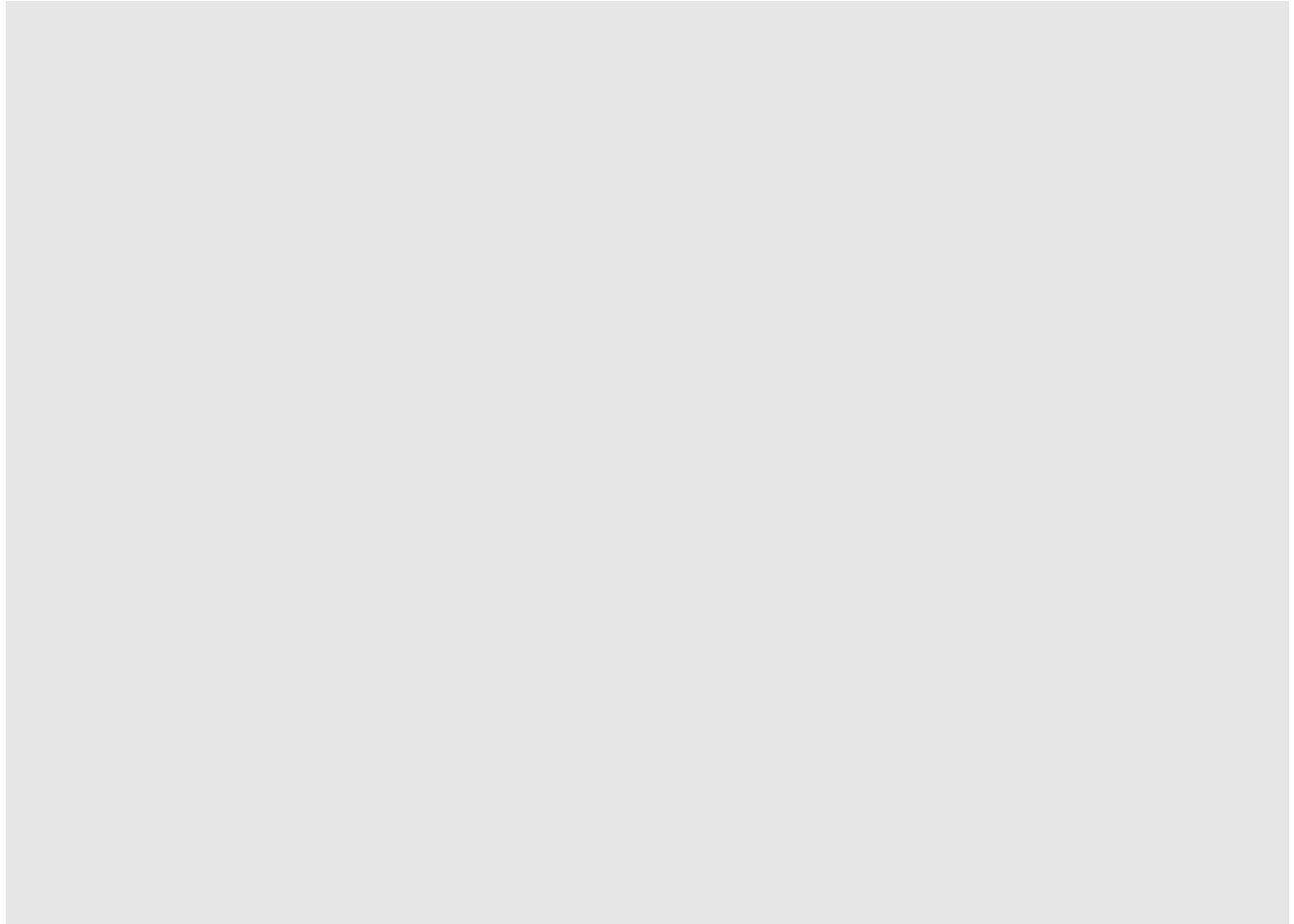
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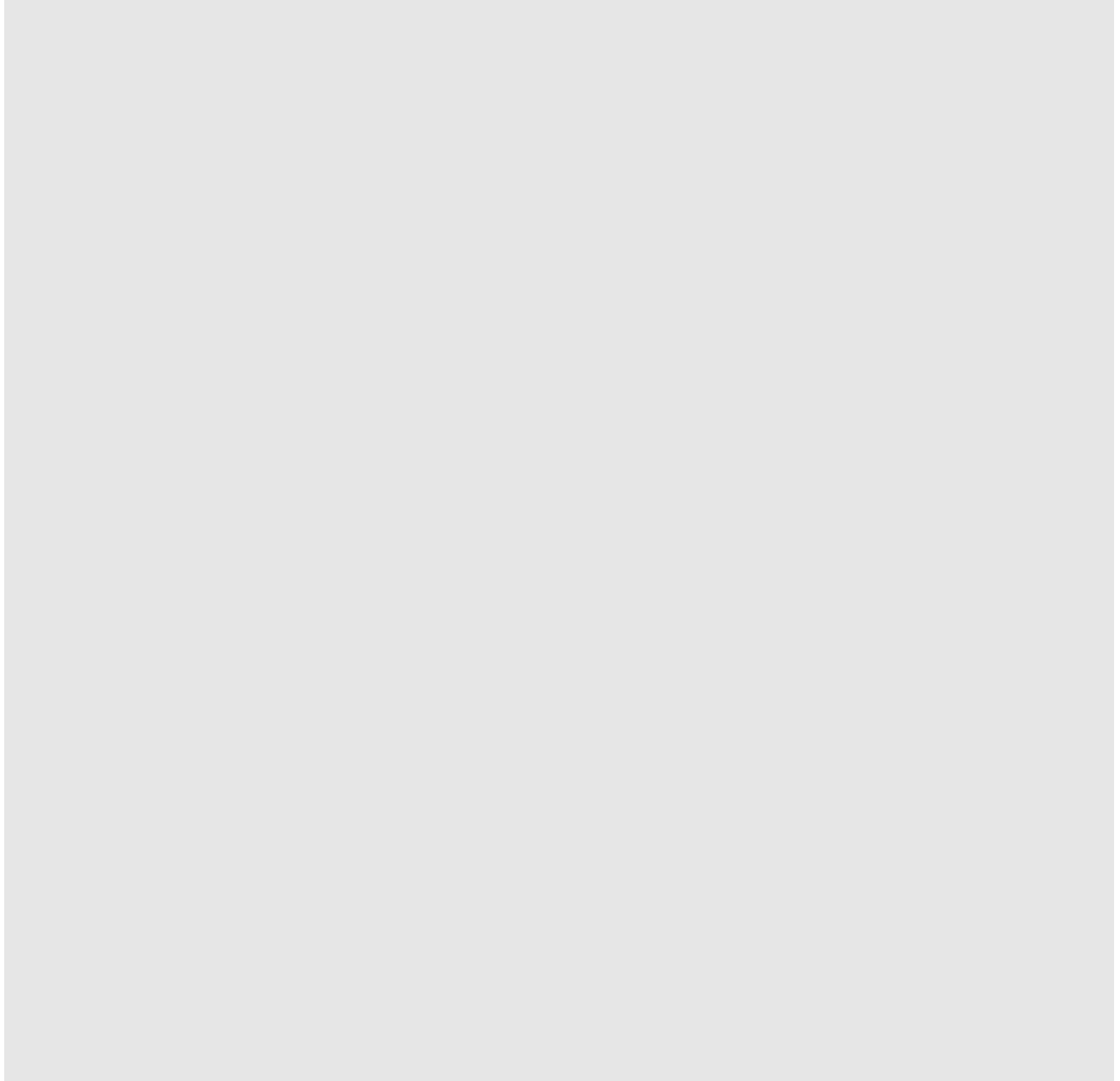
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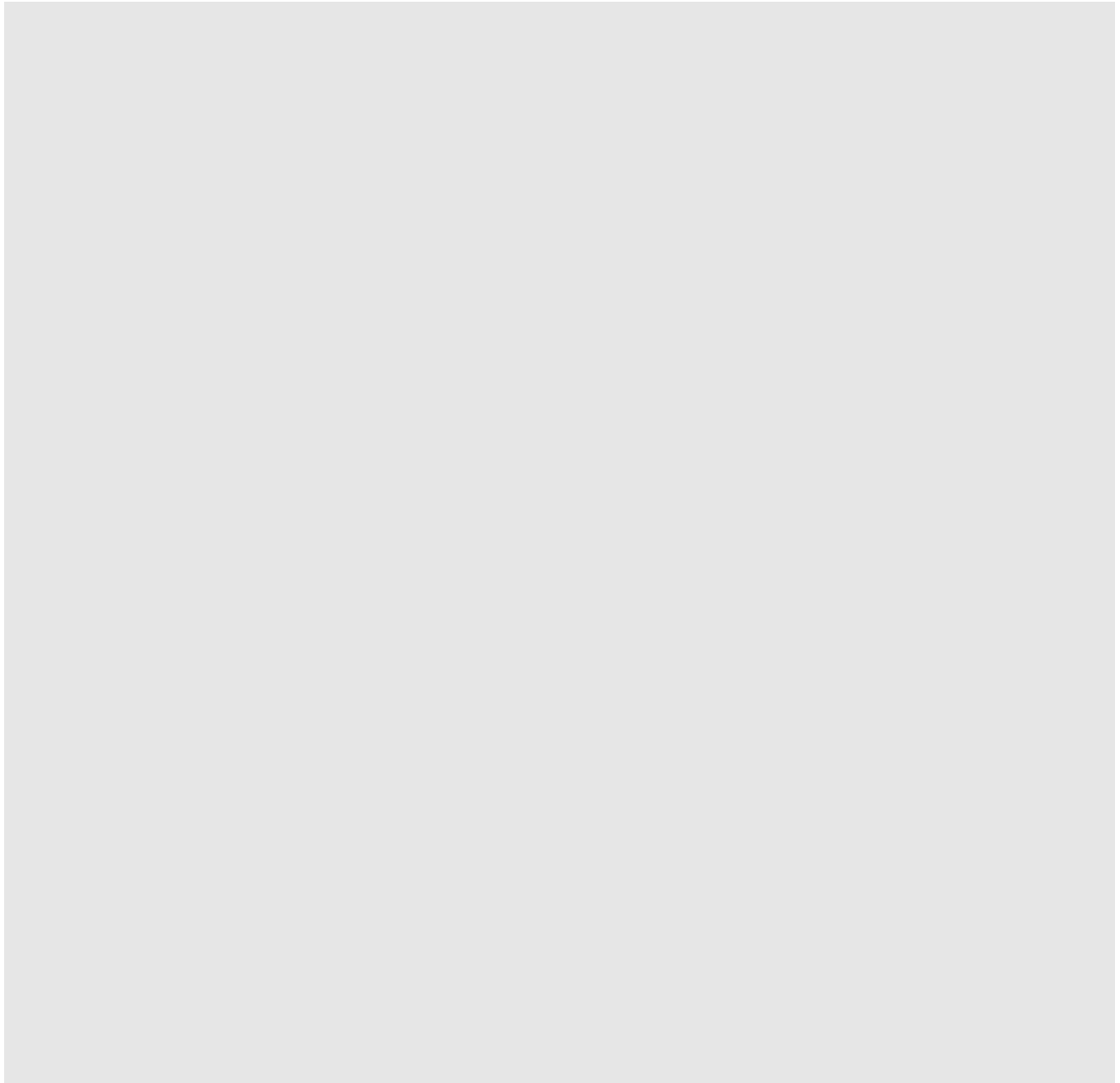


Questions and Exercises

1) What are the main challenges you and your business are currently facing?

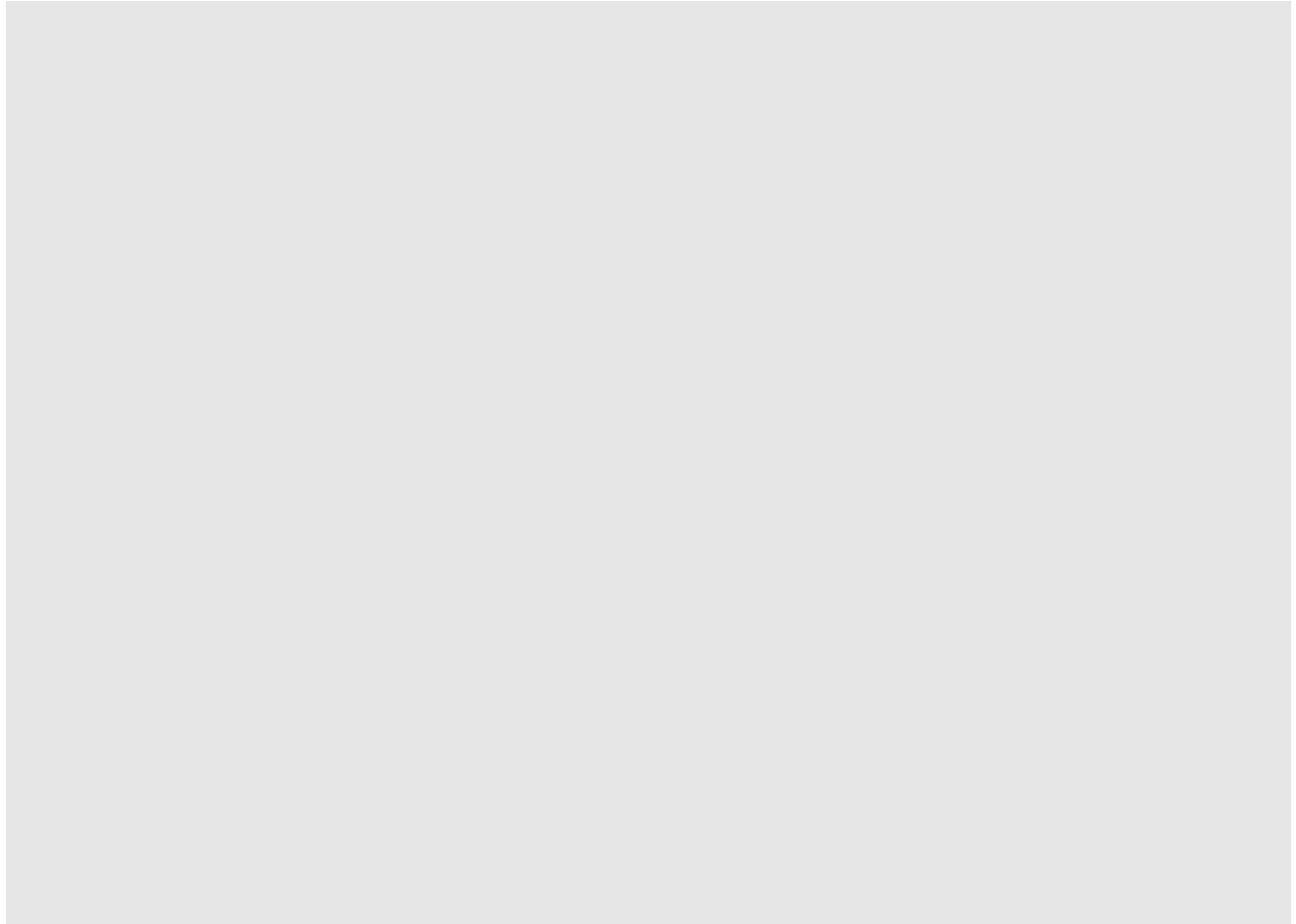


2) What are some of the opportunities that you and your business can look forward to?



[CLICK HERE](#) to view an audio-visual presentation related to this section of the course.

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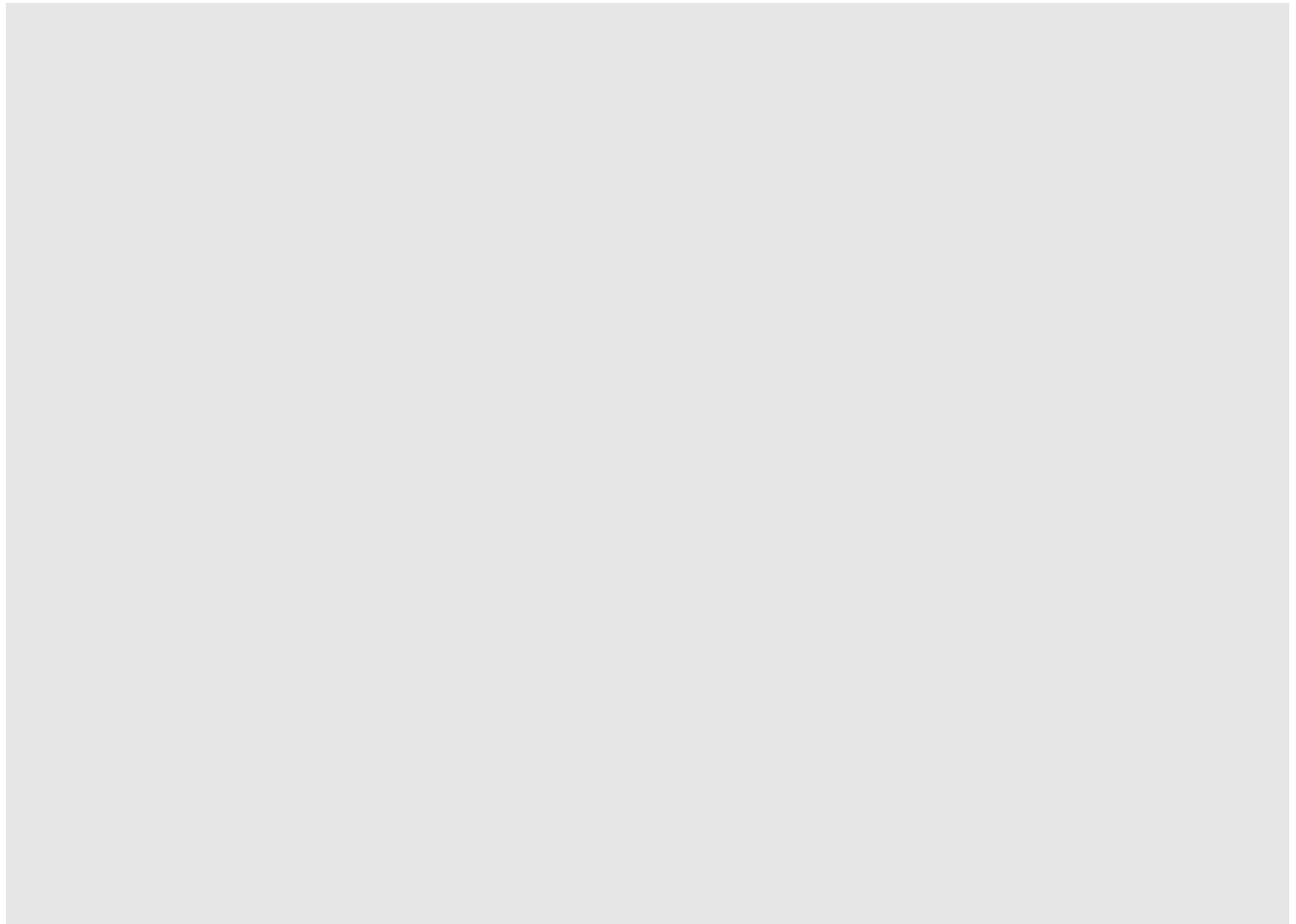


Exercise 3 – Testimonials and Referrals

List here 10 or more clients who are very pleased with the quality of products or services that you offer and who could be willing to provide you with testimonials and referrals.

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My Commitment

I agree to the following:

- 1) To spend the necessary time to complete the exercises and any additional homework this has been assigned to me between sessions. I know that what I will learn in this program will be useful to me all my life. I know how busy I get and how easy I can get distracted but I realize that the time I invest learning the concepts and completing the work will probably be the best investment in time I will have ever made.
- 2) To complete a daily TO DO list every day. I commit to take fifteen minutes at the end of each day to go over the TO DO list for that day, to check the items I have completed and then prepare my TO DO list for the next day. I understand that this is one exercise that is really a must and will help me stay on track.
- 3) The best way to learn the ideas that I am exposed to is to use them, is to apply them in my day to day selling activities. I agree to make the necessary effort to use as many of the concepts as possible.
- 4) I agree to attend all the coaching or training sessions on the days they were scheduled in order to maintain the momentum that is needed to maximize the learning process.

Name

Date

Title

Telephone Number

Organization

E-Mail Address

Your Signature

TO DO LIST - Experiencing The Winning Edge

Name:

Date

Business Goals for the Next Twelve Months (Module 2 of Experiencing The Winning Edge - EWE)

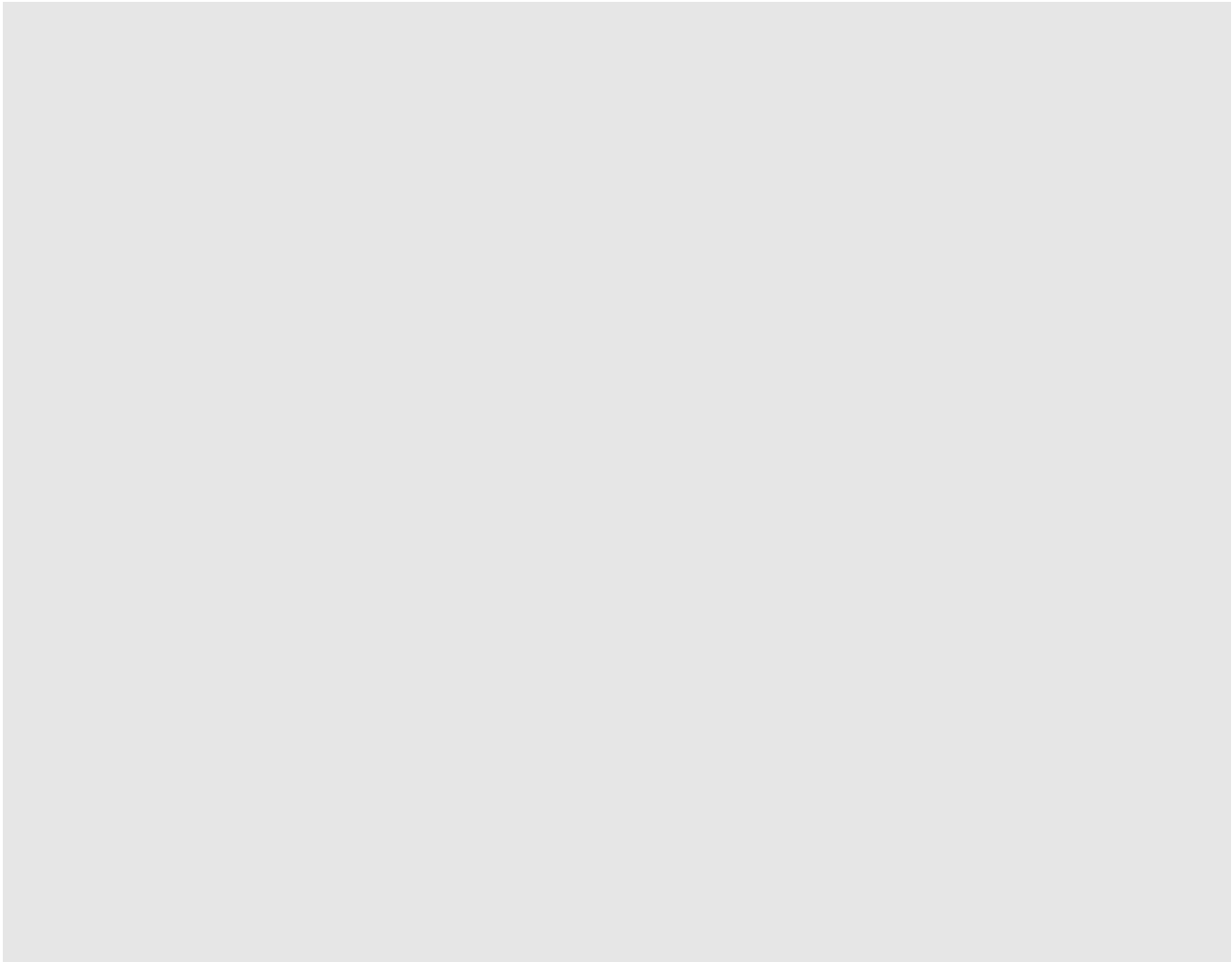
Week Starting On:

Key Work-Related Objectives This Week:

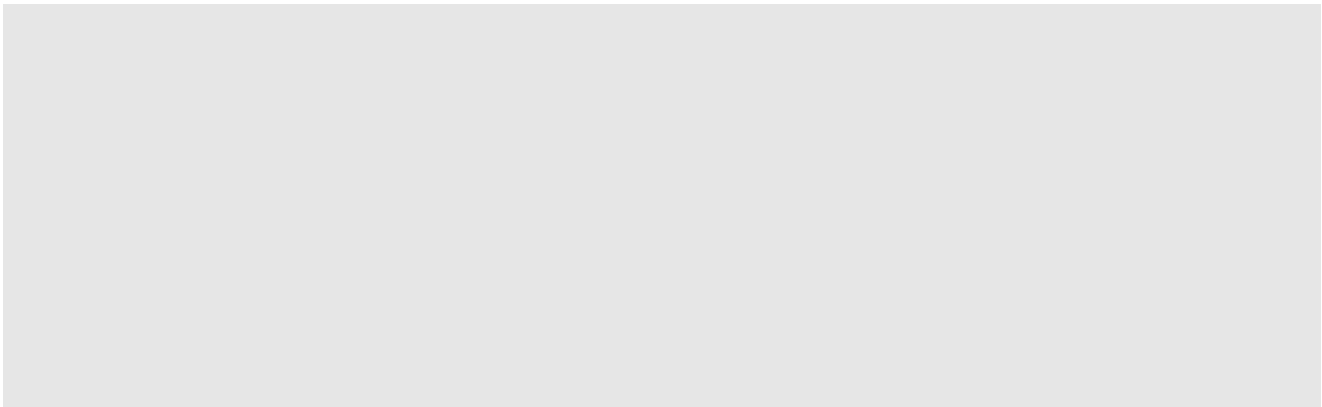
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Your Rating

Personal Objectives for the Next Twelve Months (From Module 2 of EWE)



Key Personal Objectives This Week:



Today's Date:

TODAY'S TO DO LIST (Completed Yes = Y, No = N, Partially = P)
Personal Activities

Your Rating

Actions to Maintain Enthusiasm and Self-Confidence and Develop Win-Win Relationships (After having completed modules 4 and 7 of EWE)

TODAY I Have: (Completed Yes = Y, No = N, Partially = P)

Your Rating

- 1) Read my list of strengths at least 3 times.
- 2) Been involved in at least two motivating activities.
- 3) Made plans for at least two motivating activities for tomorrow.
- 4) Made sincere compliments to at least 3 different people I met or contacted by phone.

About The Author

George Beshara

George Beshara is the author of the Leading by Managing My Life series of programs published by the Managing My Life Institute and distributed by G.O.L.E.A.D a not for profit organization based in Montreal, Canada.



As a Business Coach, George has a proven record of leading small businesses and entrepreneurs to always grow their business intelligently.

Involved in training, coaching and publishing since 1983 a few of George's accomplishments include:

- Provided business coaching solutions to a large number of clients helping them launch and maintain very successful businesses.
- Established a highly successful career transition coaching practice with corporate clients including Royal Le Page, Swiss Bank Canada, The Foresters, Employment and Immigration Canada, CIBC Wood Gundy, Ontario Government, Molson, and Eaton's among many others.
- Custom-developed training programs which were delivered nationally to a large number of corporate clients.
- Authored more than 11 Managing My Life programs which have been used with more than 100,000 individuals worldwide.
- Author of Experiencing The Winning Edge.

For more information please visit:

<http://www.go-lead.org>

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The Stepping-Up Approach To Business Success

EXPERIENCING THE WINNING EDGE

MODULE TWO

GOAL-SETTING AND TAKING ACTION

A Gift from G.O.L.E.A.D.

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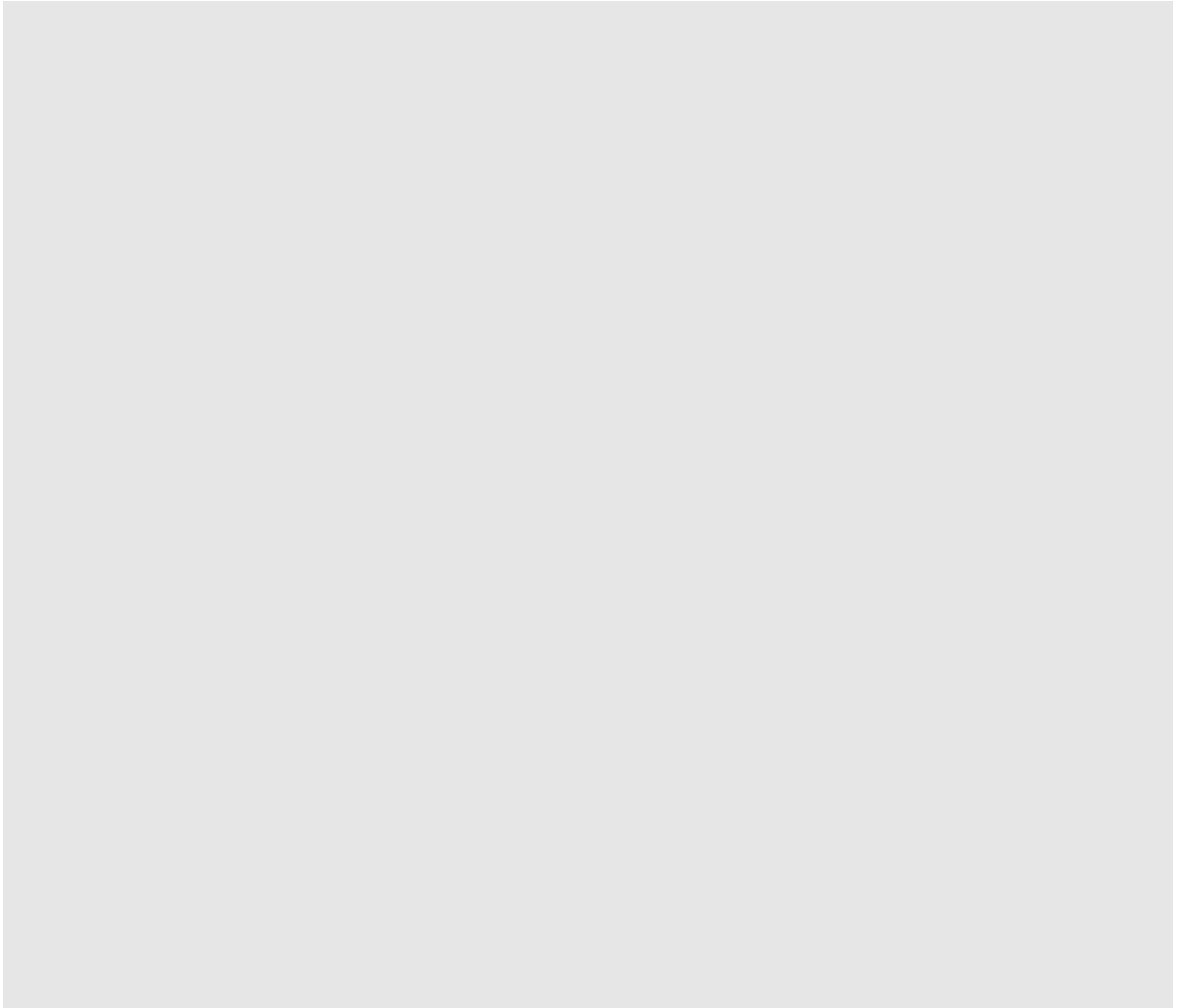
Objectives of Module Two:

As a result of completing this Module, you should be prepared to answer the following questions:

1. What is goal-setting?
2. What are the benefits of goal-setting?
3. How do you convert the general goals into specific, measurable and time specific goals?
4. Describe the Bucket List goal-setting technique:
5. Describe the Inventory goal-setting technique:
6. What are the questions you should ask yourself when using the Needs-Based goal-setting technique?
7. Describe the four steps of the Creative goal-setting technique.

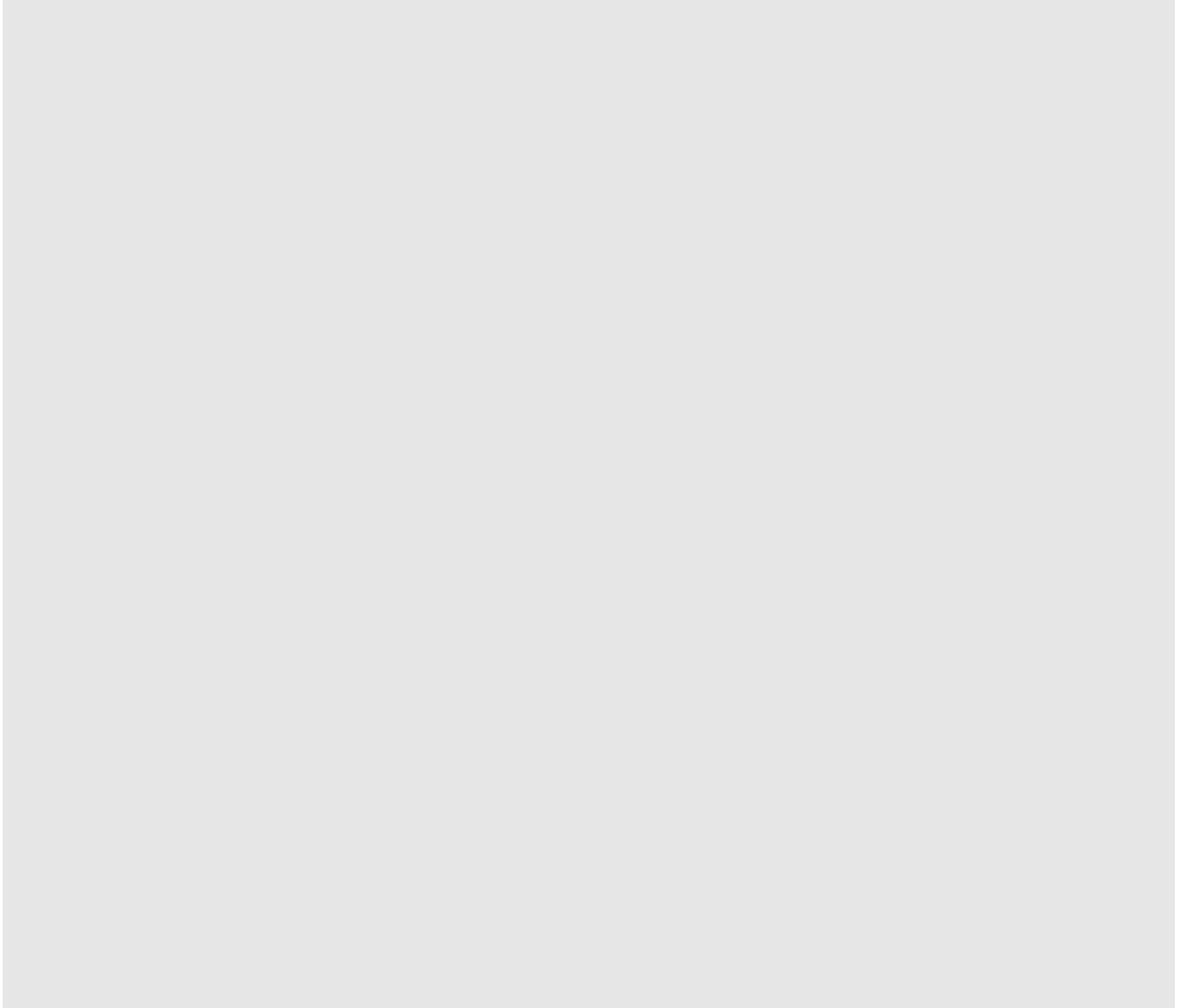
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Exercise A ~ Converting Goals

Convert the following general goals into specific, measurable and time specific goals:

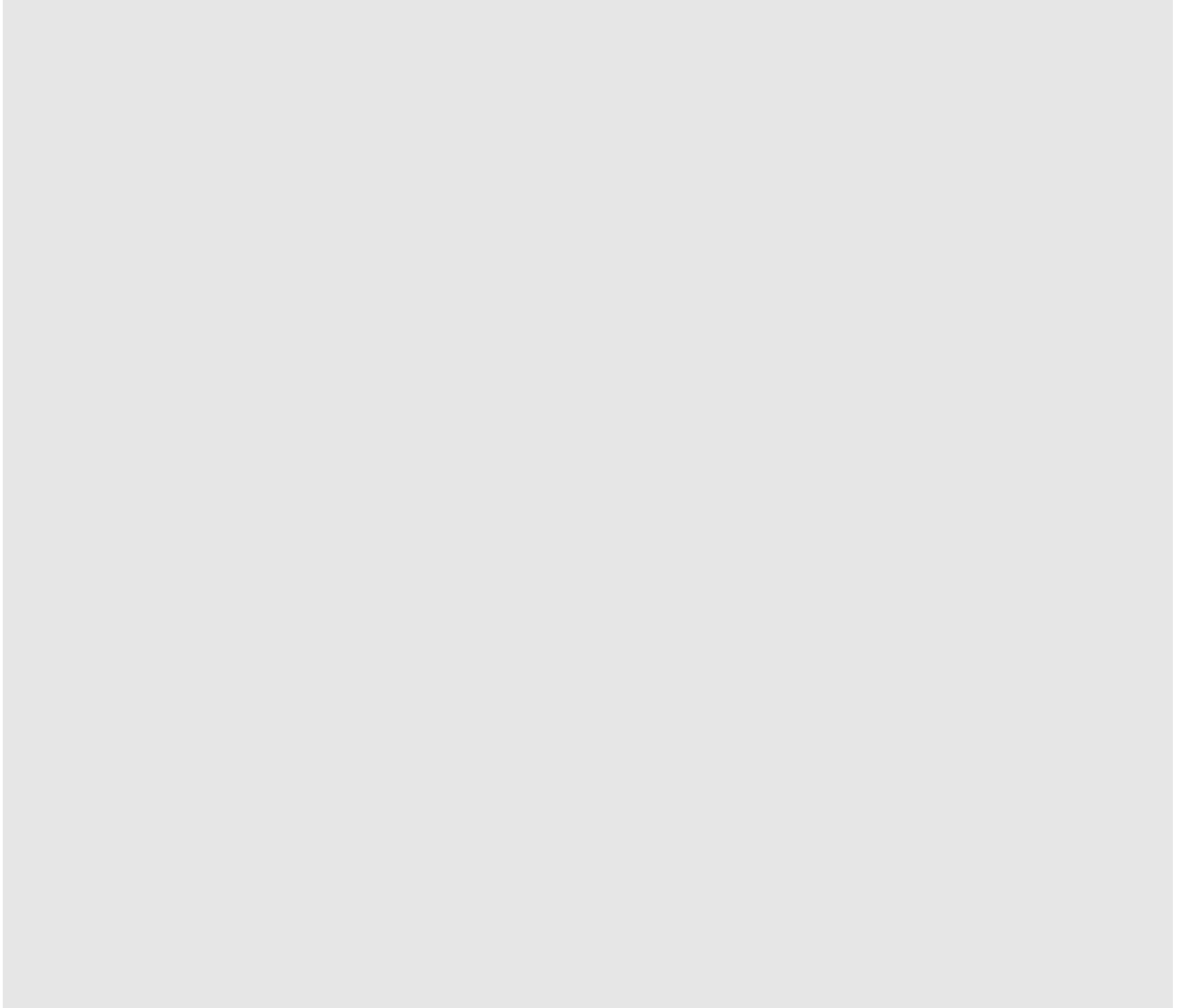
a) I would like to increase my sales.

b) I would like to increase the number of referrals I receive.

c) I would like to achieve financial independence.

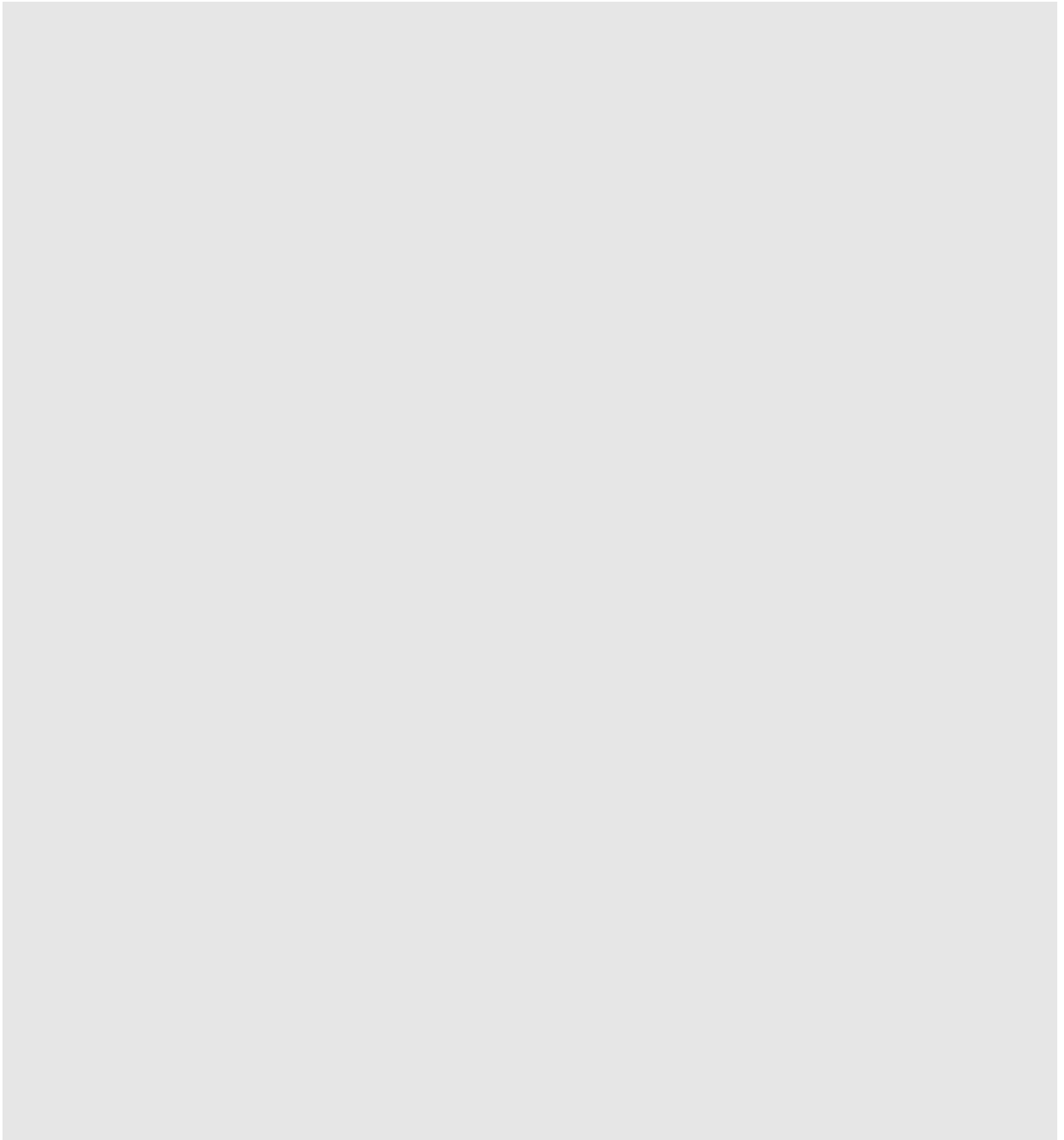
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Exercise B ~ Your Bucket List

Make a list of the trips you want to take, the things you want to own, the income you want to make, the relationships you want to develop, the friendships you want to make, the causes you want to help, the hobbies you want to enjoy. The Bucket List is your wish list. It has no limitations. Remember to include at least one goal from your Bucket List each year in your priority list of goals for that year.



Bucket List – Continued

A large, empty rectangular box with a light gray background, intended for a bucket list.

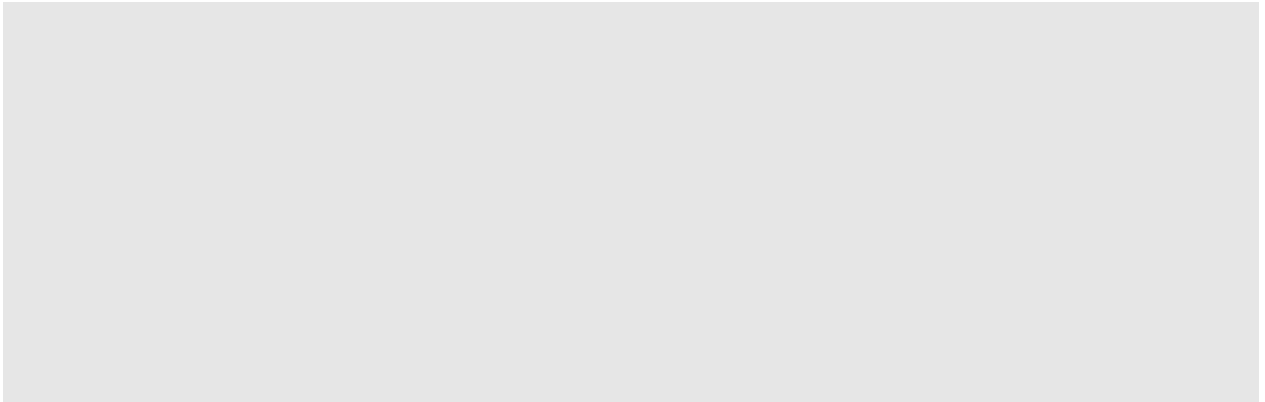
Exercise C – Inventory-Based Goal-Setting

A- Work Related Goals

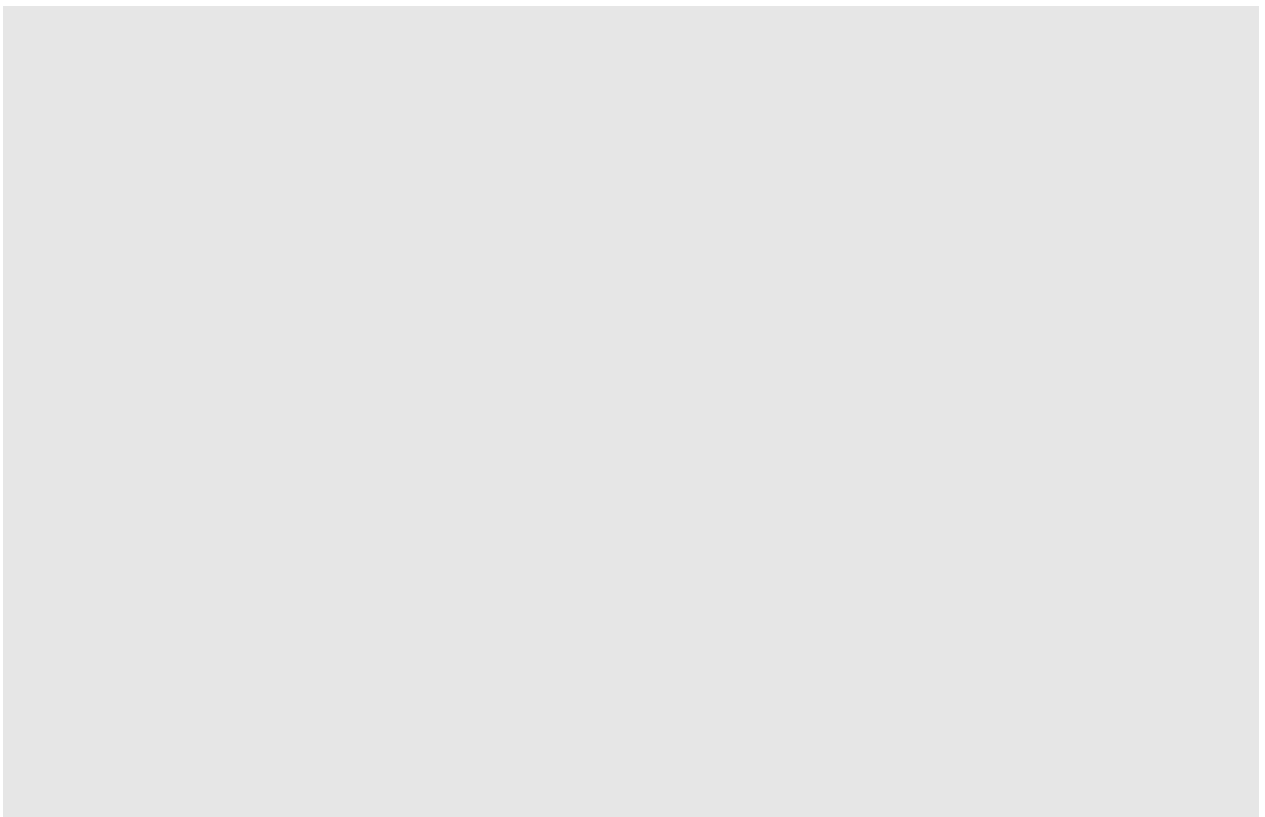
1. Think of your Main Responsibilities at Work

Which Do You Enjoy Most?

Which Do You Enjoy Least?



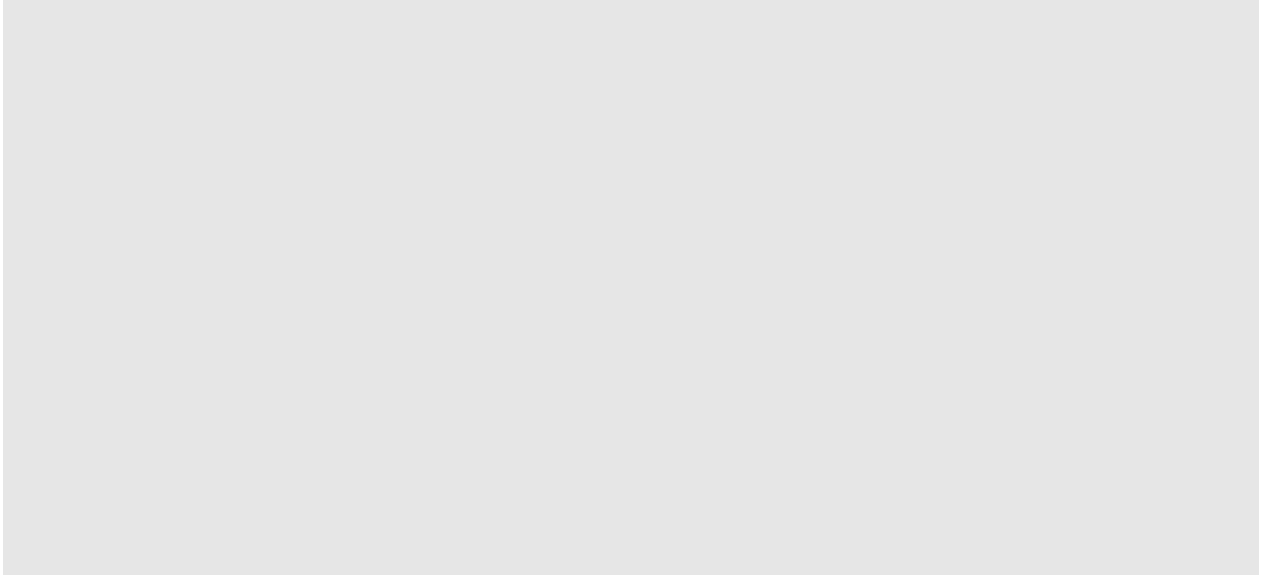
Current and New Responsibilities You Would Like to have in the Next 12 Months:



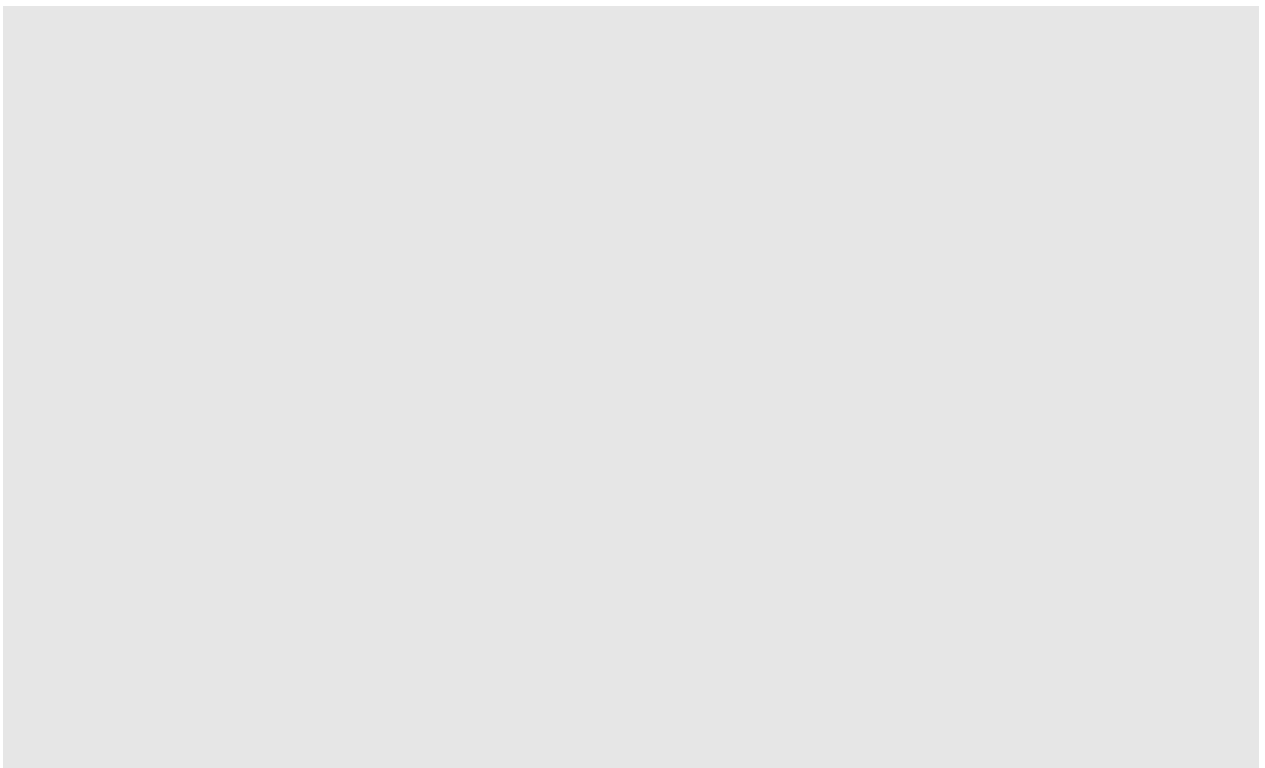
2. Think of our Organization's Current Products and Services

Which Are the Highest Selling?

Which are the lowest selling?



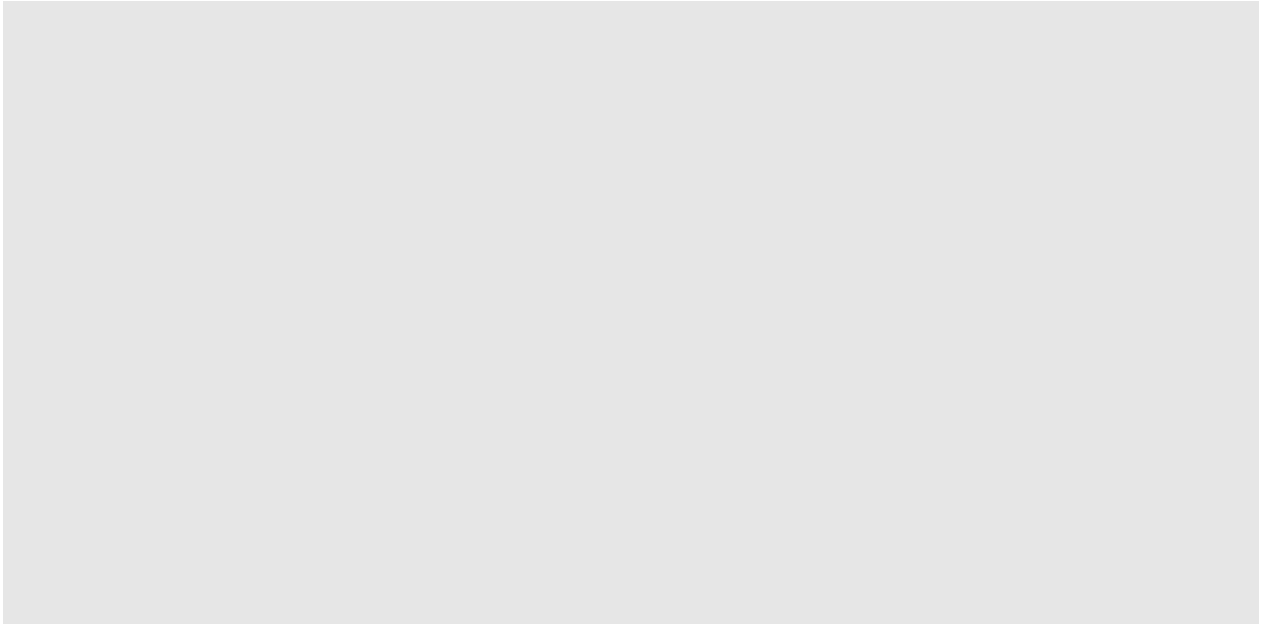
Current and New Products or Services You Would Like to Be Selling in the Next 12 Months:



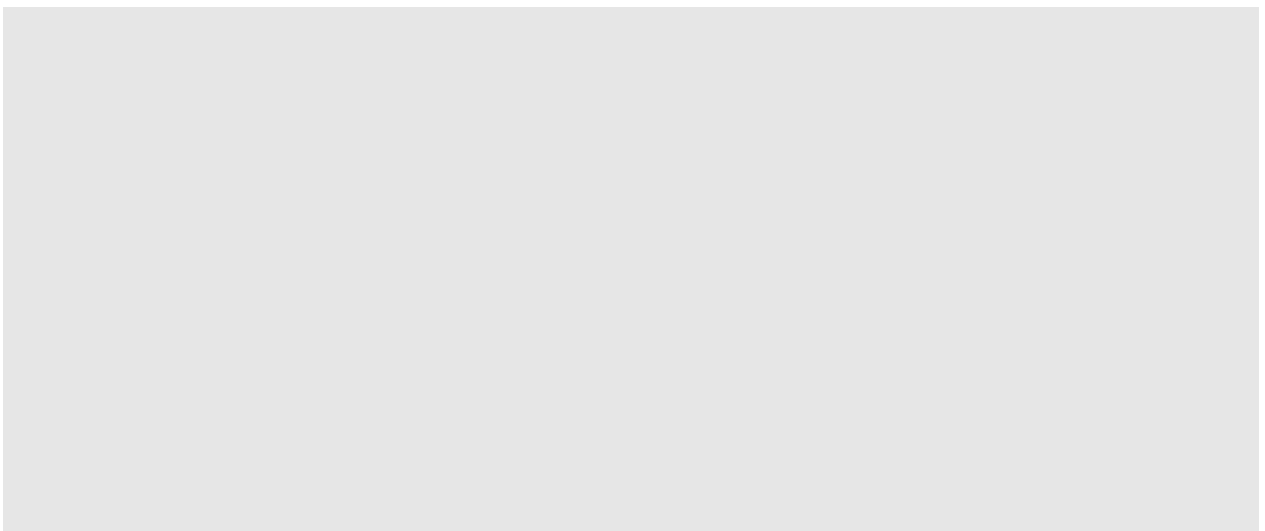
3. Think of your Main Skills – The Ones You Use On the Job
(Knowledge of, your ability to)

The Skills You Excel At

The Skills You Can Improve

A large, empty light gray rectangular box intended for a user to write down their skills. It is positioned below the two column headers and above the next section header.

New Skills You Would Like to Learn in the Next 12 Months:

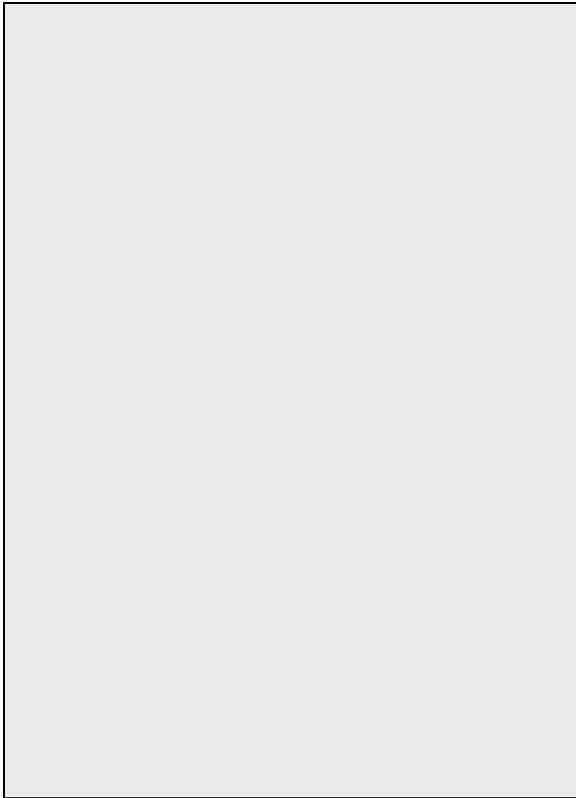
A large, empty light gray rectangular box intended for a user to write down new skills they want to learn. It is positioned below the section header and above the footer.

4. Your Key Accomplishments in the Past 12 Months Including Sales Results

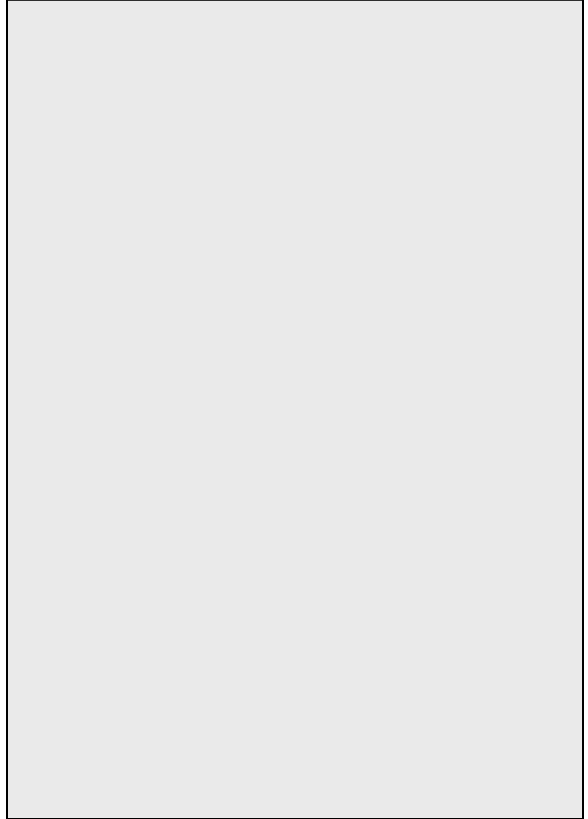
5. Any Key Disappointments in the Past 12 Months?

7. Your Key Work Relationships:

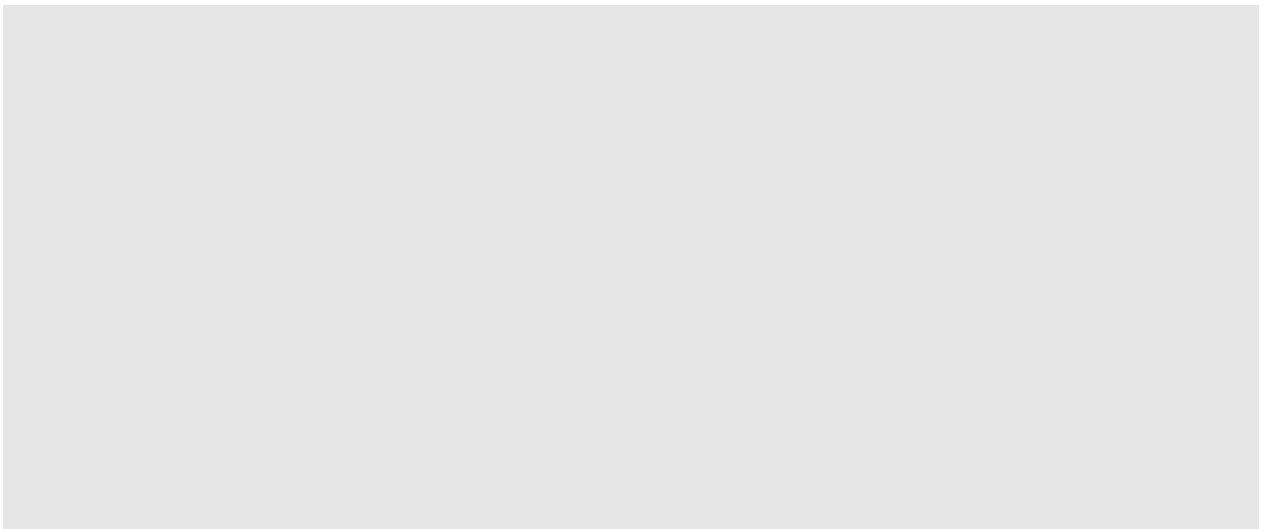
Relationship

A large, empty rectangular box with a thin black border, intended for writing notes about a work relationship.

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A large, empty rectangular box with a thin black border, intended for writing notes about a work relationship.

Work Relationships You Need to Improve or develop in the Next 12 Months:

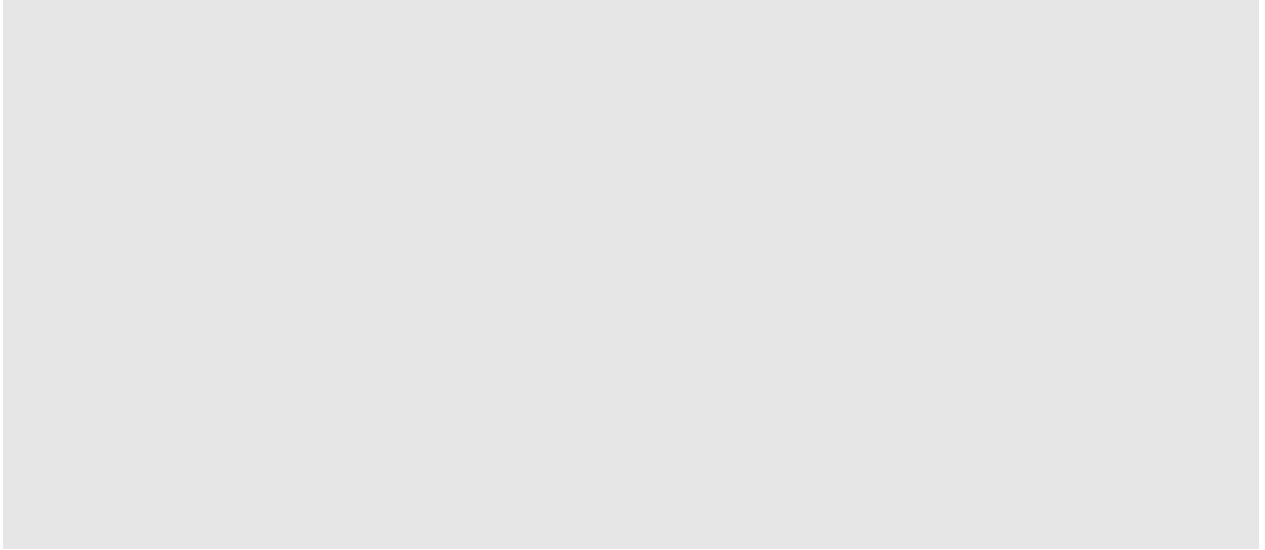
A large, empty rectangular box with a thin black border, intended for writing notes about work relationships to be improved or developed.

B – Personal Life Related Goals

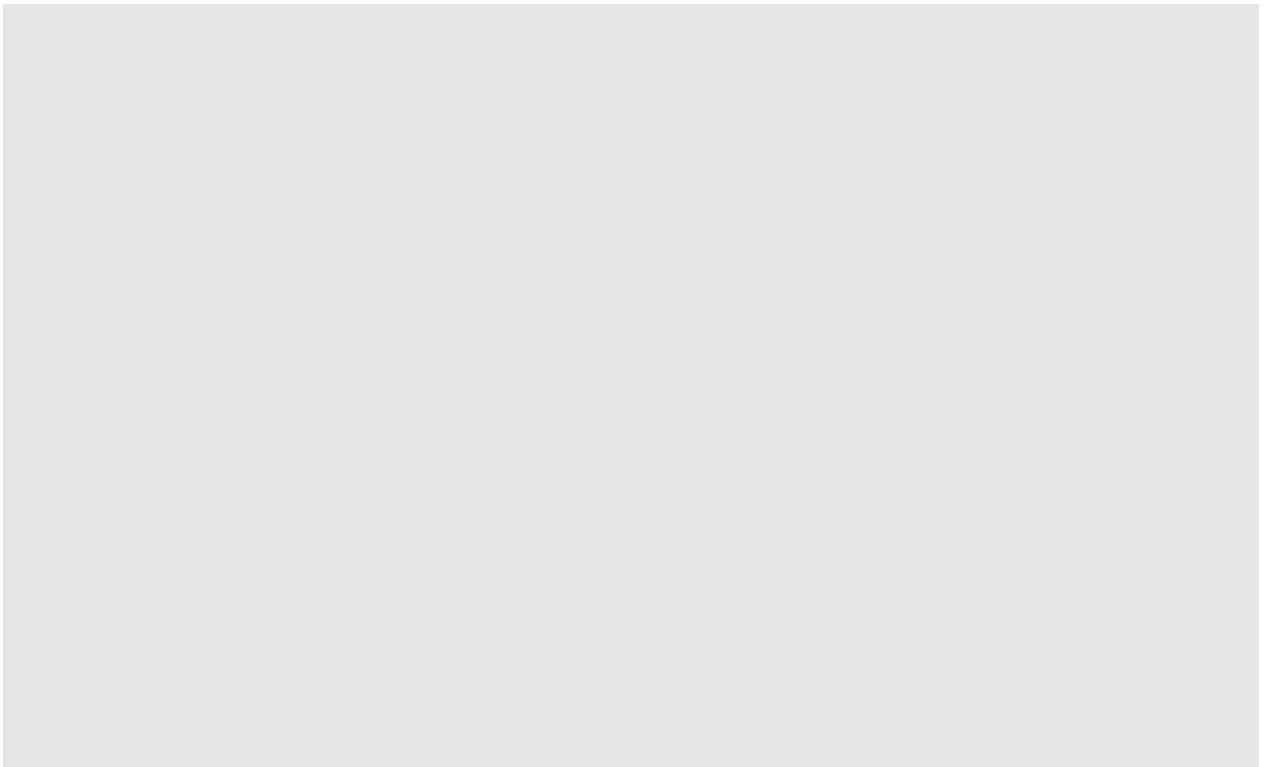
1. Think of your Current Personal Responsibilities

Which Do You Enjoy Most?

Which Do You Enjoy Least?

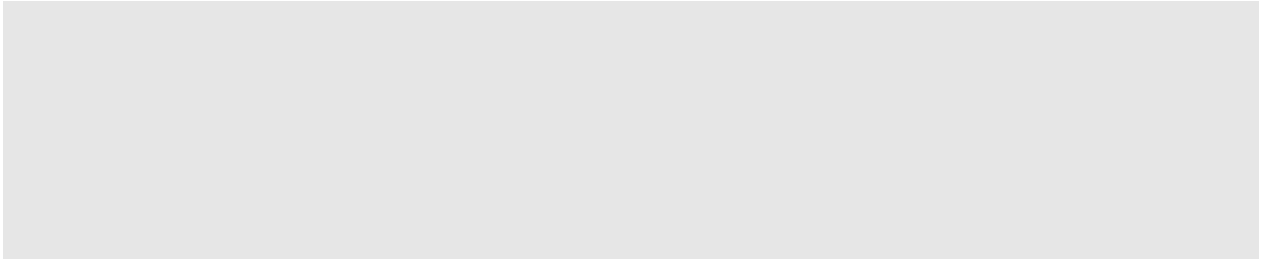


Current and New Personal Responsibilities You would like in the Next 12 Months:



2. Think of your current Financial Situation;

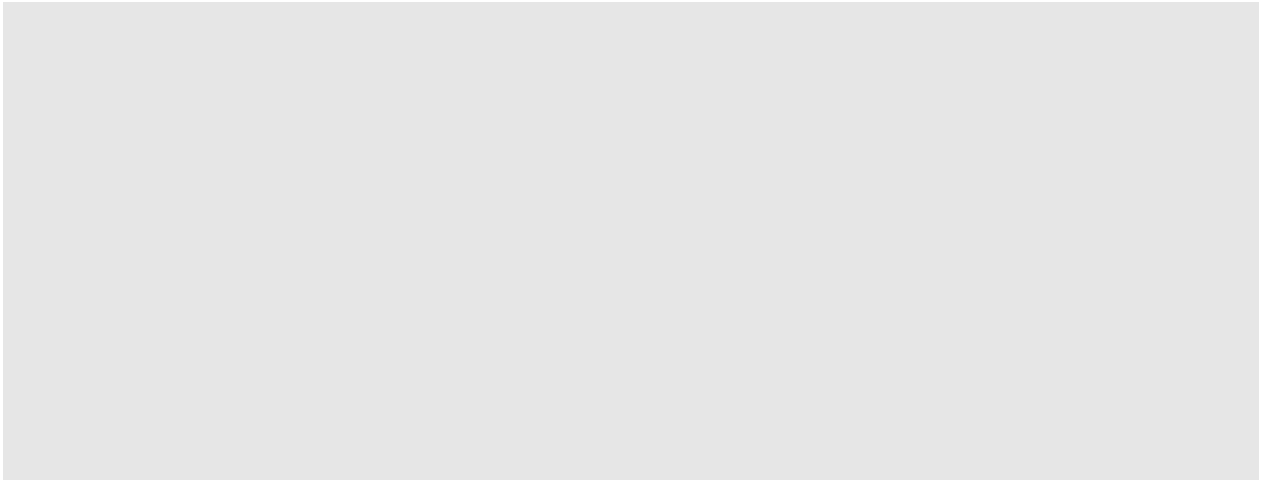
What Changes in your Financial Situation Would You like to Experience in 12 Months?



3. Health and Fitness

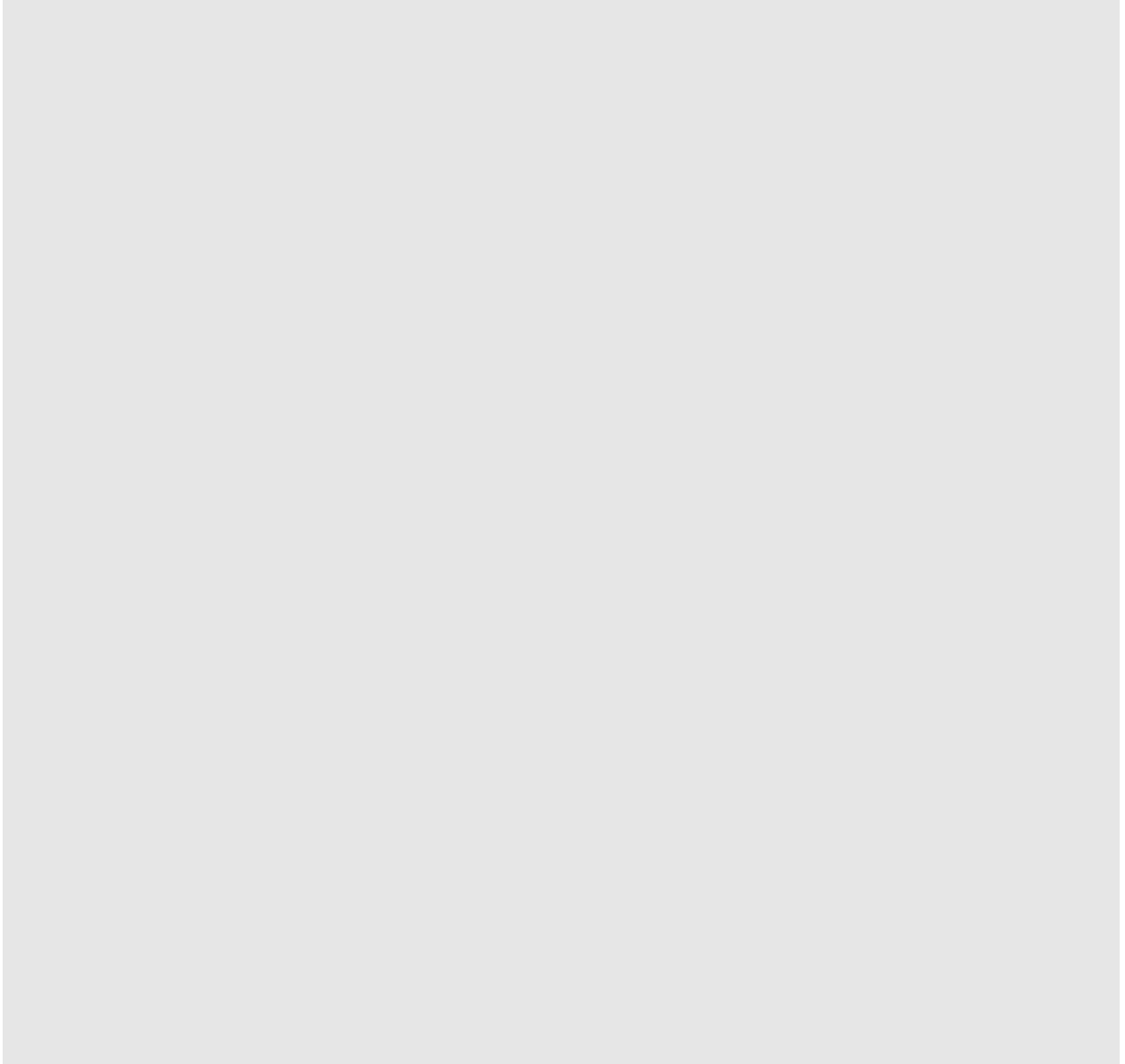
Think of Your Fitness Activities in the Past **12 Months**:

Which Fitness Activities You Would Like to Continue or Start In the Next 12 Months?



4. Think of the Hobbies and Interests (including travel) **you have enjoyed**
in Past 12 Months:

Hobbies and Interests You Would Like to Continue or Start in the Next 12 Months:

A large, empty light gray rectangular box, intended for the user to write their hobbies and interests for the next 12 months.

5. Your Key Personal Relationships:

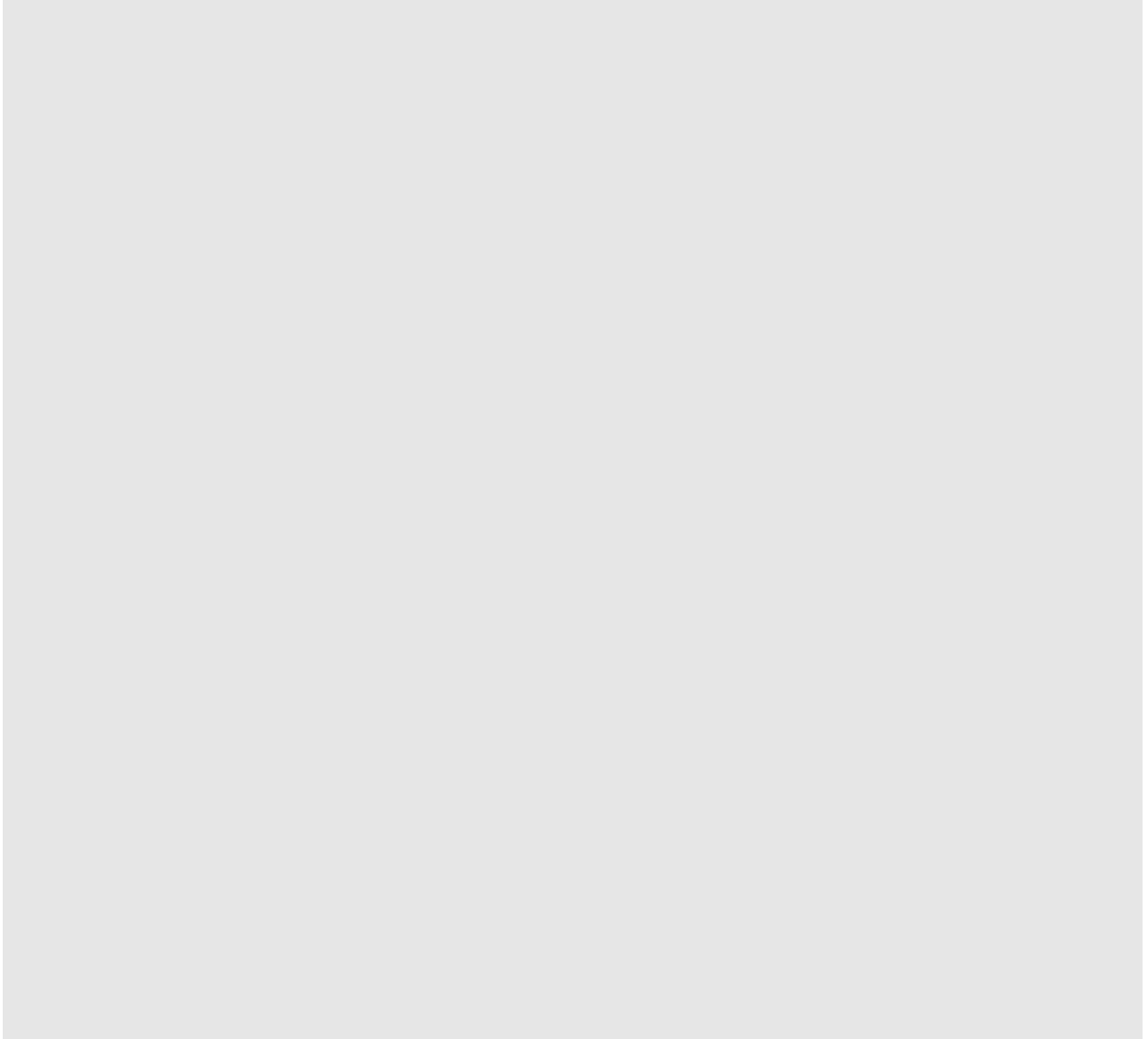
Relationship

Relationship

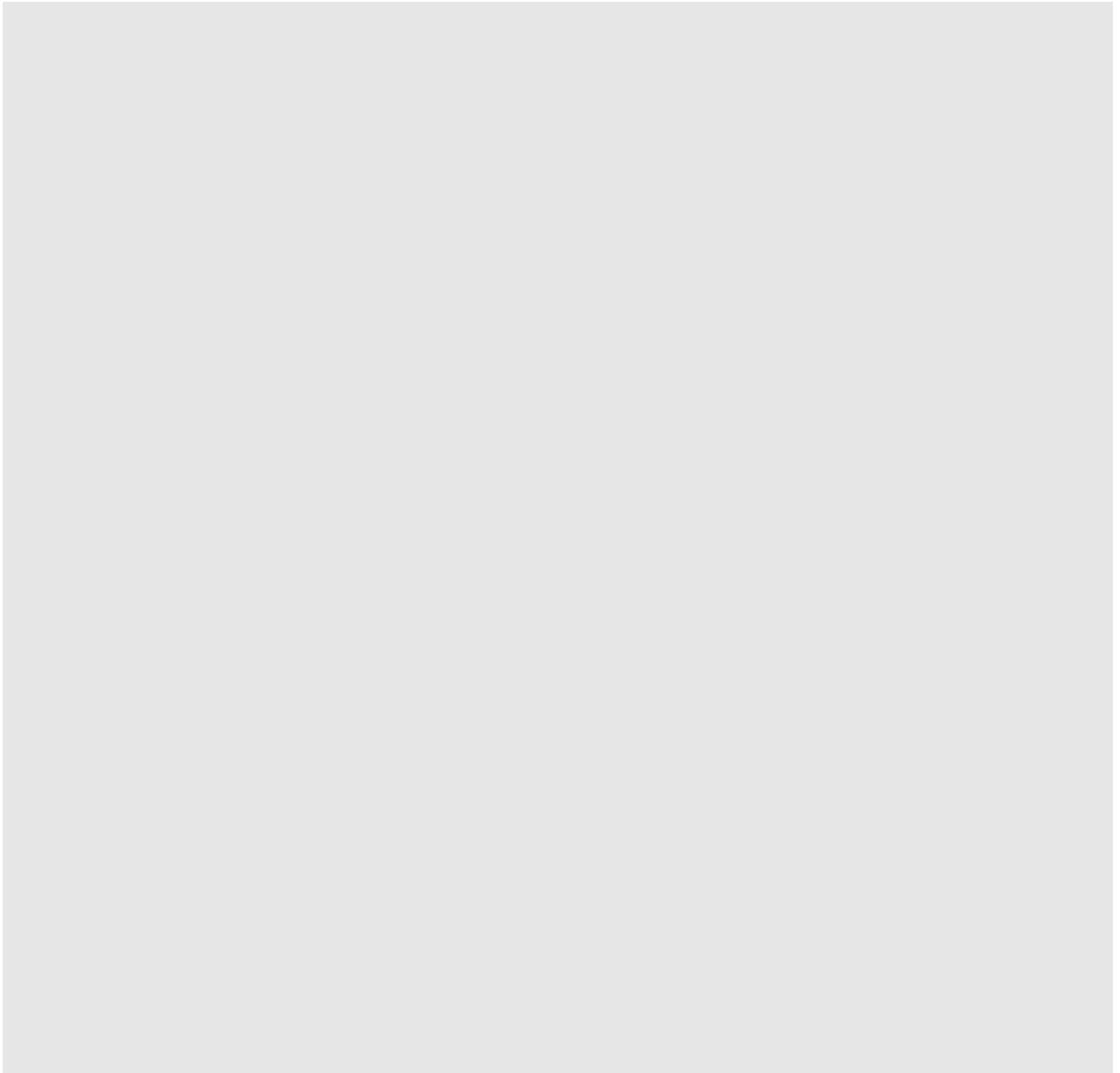
Personal Relationships You Would Like to Improve or develop in the Next 12 Months:

Top TWENTY Priorities at Work over the Next Twelve Months (Including items from the Bucket List

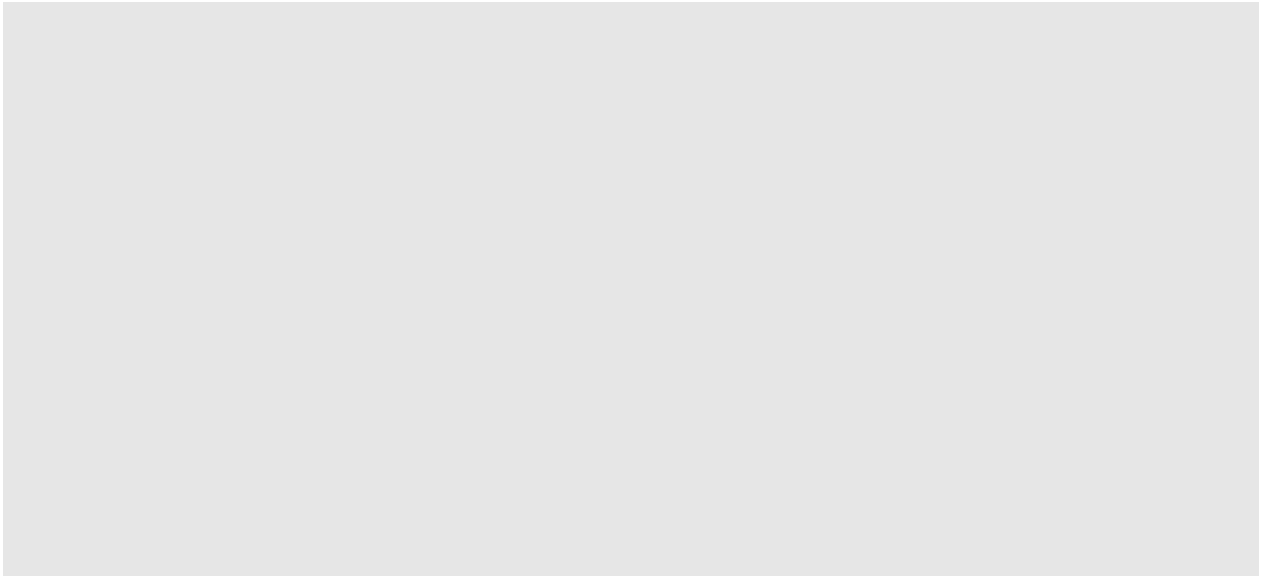
As you think they should be



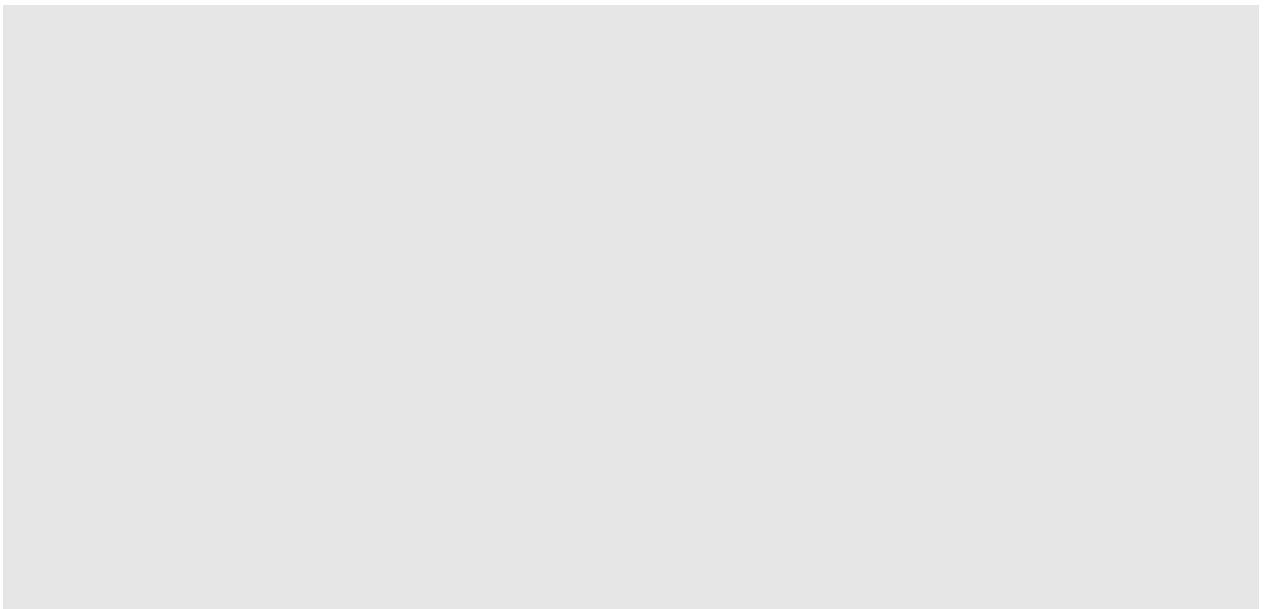
Top TWENTY Priorities at Work over the Next Twelve Months
After discussing them with your boss and colleagues



Essential Actions at Work
As you think they should be



Essential Actions at Work
After discussing them with your boss and colleagues

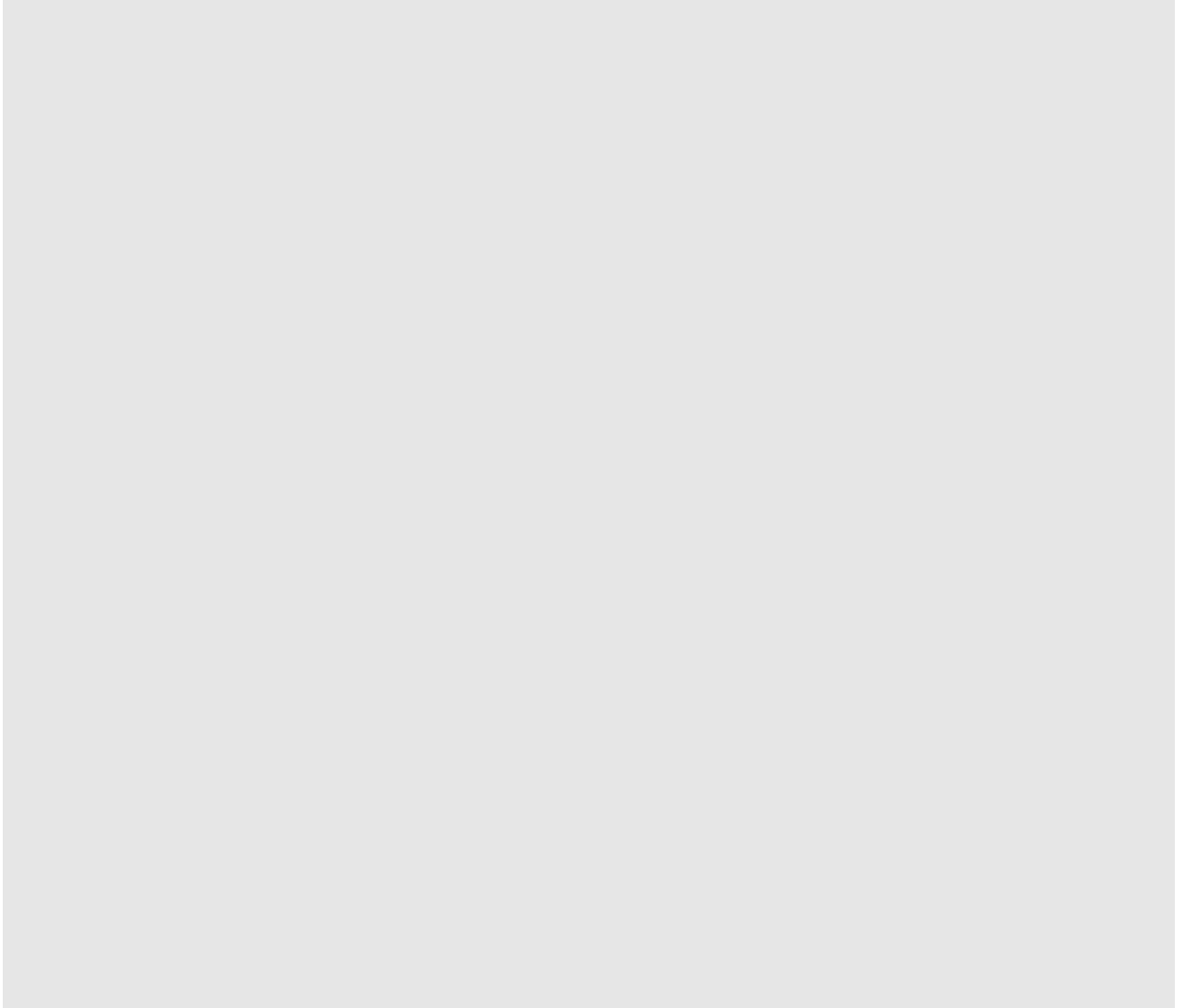


Top TWELVE Personal Life Priorities over the Next Twelve Months
(Including items from the Bucket List)
As you think they should be

Top TWELVE Personal Life Priorities over the Next Twelve Months
After discussing them with your spouse and family members

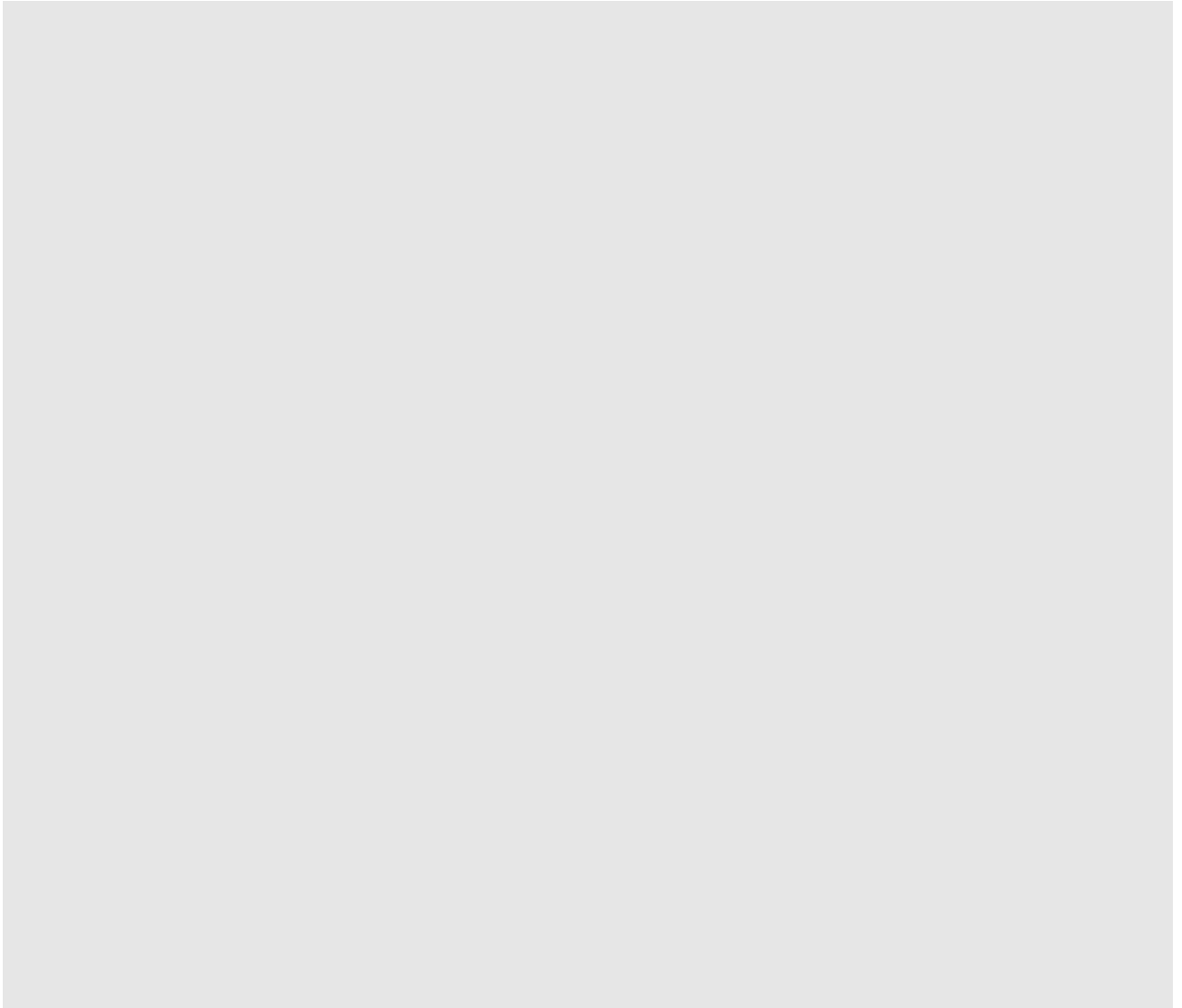
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Exercise C ~ Action Plan

Use the method outlined in this form for each goal you've listed in your workbook. First, write in the goal and your targeted completion date. Then, identify the various steps that need to take place in order for the goal to happen. Once the steps are listed, use the “#” column to assign each of the steps a priority and then identify a target date for the completion of each step and write it in the “Date” column. As target dates for each step are completed, check them off. (See example on next page)

Goal:

Completion date: _____

#

Steps:

Date:

x

--	--	--	--

Example Action Plan

Date: March 1

Goal:

Secure 1 new client a month for my law practice beginning May 31 (in 3 months).

Completion date: May 31

#	Steps:	Date:	x
1	Attend 2 or more networking events each month	Ongoing	
1	Review business cards collected & identify the individuals to contact.	Ongoing	
2	Preparing a script of what I will be saying when I call.	March 5	
	Contact other lawyers I know who practice family law in order to explore a strategic alliance in order to cross-refer clients.	Ongoing	
3	Make a minimum of 5 calls a day to existing clients or contacts from among the ones I identified in order to update them on my situation and to ask for referrals.	Ongoing	

About The Author

George Beshara

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The Stepping-Up Approach To Business Success

EXPERIENCING THE WINNING EDGE *MODULE THREE* MANAGING STRESS AND MAINTAINING A POSITIVE ATTITUDE

A Gift from G.O.L.E.A.D.

Montreal, Quebec, Canada



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Course Materials updated March 2025

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Experiencing The Winning Edge

Table of Content

- 1 Introduction: Positioning Yourself for Success in These Challenging Times
- 2 Goal-Setting and Taking Action
- 3 Managing Stress and Maintaining a Positive Attitude**
- 4 Maintaining a High Level of Enthusiasm and Self-Confidence.
- 5 Managing Your Time and Using Technology More Effectively.
- 6 Identifying Your Best Target Markets.
- 7 Building Relationships.
- 8 Prospecting Intelligently.
- 9 Networking Intelligently.
- 10 Identifying Client's Needs – Asking the Right Questions.
- 11 Presenting Solutions and Recognizing Buying Signals
- 12 Handling Objections and Closing the Sale





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- Want to improve ability to manage change.
- Have recently started a business and want to improve business results.
- Have been in business for a while and would like to take it to the next level.

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Finally let us remind you that the best way to really learn the ideas that you are exposed to and that you feel are useful, is to use and apply them in your day to day activities.

We take this opportunity to wish you continued personal and professional success.

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Management Team
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Introduction

Please take a minute to view the following very short introductory audio-visual presentation which highlights the skills that very successful entrepreneurs and sales professionals excel at by:

[CLICKING HERE](#)

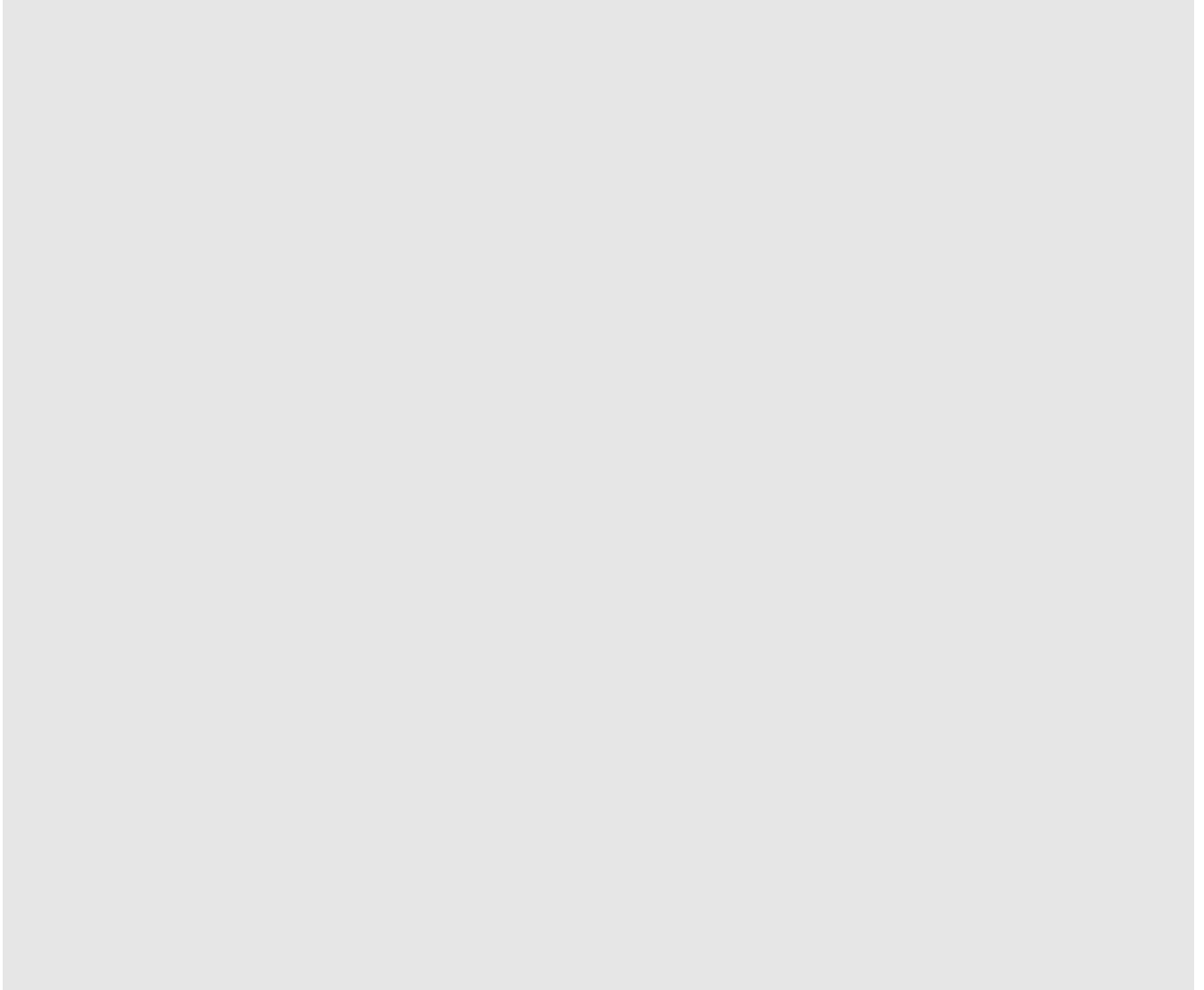
Objectives of Module Three:

As a result of completing this Module, you should be prepared to answer the following questions:

1. What is stress?
2. What are the typical sources of stress? (Give examples)
3. What is attitude?
4. What are typical behaviors when we have a negative attitude?
5. What are typical behaviors when we have a positive attitude?
6. What are examples of some unproductive thought reactions?
7. What are examples of healthy thought reactions?
8. What are 3 techniques we can use to calm ourselves on the spot? Give details.
9. What are the 3 fundamental beliefs we all tend to have to a varying degree?
10. What are affirmations? Also please list the 4 affirmations that were discussed in the program.
11. What are the other techniques you can use to manage stress and maintain a positive attitude?

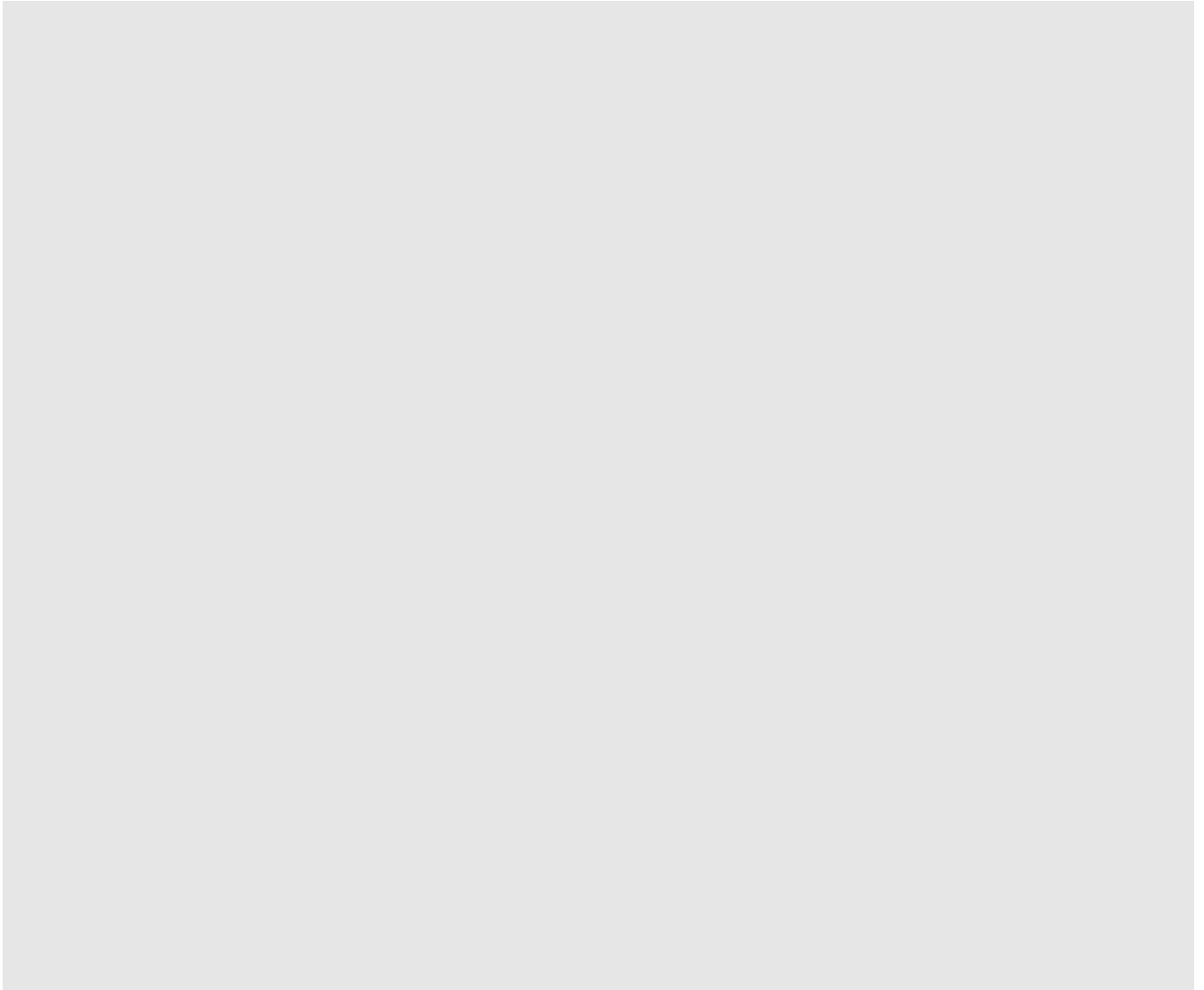
[CLICK HERE](#) to view the audio-visual presentation related to this section of the course.

Notes and Key Points to retain from this section of the course:



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A) Behaviors and Stress

Another exercise that can be very revealing when it comes to our behavior when we manage stress effectively and when we don't is Exercise D which I invite you to complete next.

Let's begin by looking at columns 3 and 4 of Exercise D. As you go down the list of characteristics listed under these two columns, you should decide which of the two characteristics describes you best. For example, are you more cautious, or are you more adventurous? Do you tend to be more trusting, or are you hard to fool?

Take a minute to **identify** the characteristic that describes you best among the ones listed in columns 3 and 4. Try to select only one tendency. If you can't, you can select both and write them in the appropriate space on the next page.

Then consider the characteristics in columns 2 and 5, and then the one which are listed in columns 1 and 6, at the side of the characteristics listed in columns 3 and 4.

If you selected cautious in column 3, the positive expression of this is that you tend to be careful in column 2 and the excessive under stress characteristic is that you tend to become immobilized in column 1. If you selected adventurous in column 4, the positive expression of this is that you act on opportunities in column 5 and the excessive under stress characteristic is that you are reckless in column 6.

Go ahead and write down in the appropriate space on the space on the next page the positive expression characteristics associated to the ones you identified from column 3 or 4 and the corresponding excessive under stress characteristics.

Exercise A ~ Positive and Negative Expressions

1 Excessive Under Stress	2	3 Positive Expression	4 Personal Characteristic	5 Personal Characteristic	Positive Expression	6 Excessive Under Stress
Immobilized		Careful	Cautious	Adventurous	Acting on Opportunities	Reckless
Easily fooled		Forgiving	Trusting	Hard to fool	Alert and watchful	Suspicious and paranoid
Withdrawn		Thoughtful	Shy and reserved	Outgoing and sociable	Friendly	Empty socializing
Lifeless		Good follower	Wait to be told	Take charge	Good leader	Pushy and bossy
Sour and cynical		Business-like	Serious and sober	Good-natured and cheerful	Positive and happy	Silly and shallow
Frustrated		Accomplishing	Practical	Imaginative	Creative	Unrealistic
Overconfident and insensitive		Positive and confident	Self-assured	Self-doubting	Sensitive and open	Feel hopeless
Stubborn		Disciplined	Self-controlled	Casual	Easy-going	Disoriented panic

Personal Characteristics

Positive Expressions

Excessive Under Stress

Exercise B - Stressors In Your Life

Stressors are simply changes which require us to adapt. Some of these changes are wanted and some are unwanted.

Take a few minutes now to identify some of the main changes you have experienced in the past year, some of which were wanted and some of which were unwanted.

Changes in your financial situation:

Wanted

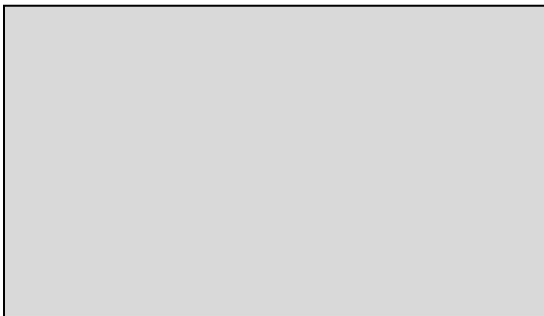


Unwanted

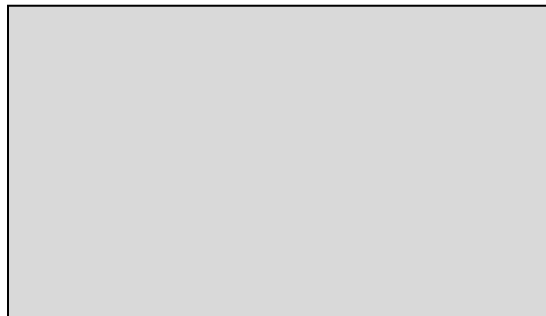


Changes in your home life, personal relationships and health:

Wanted

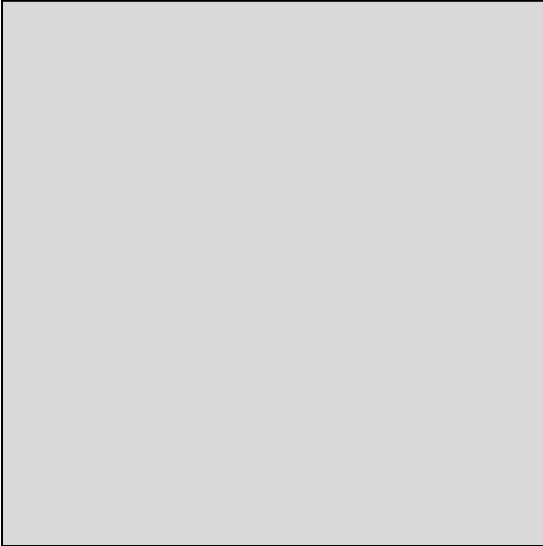


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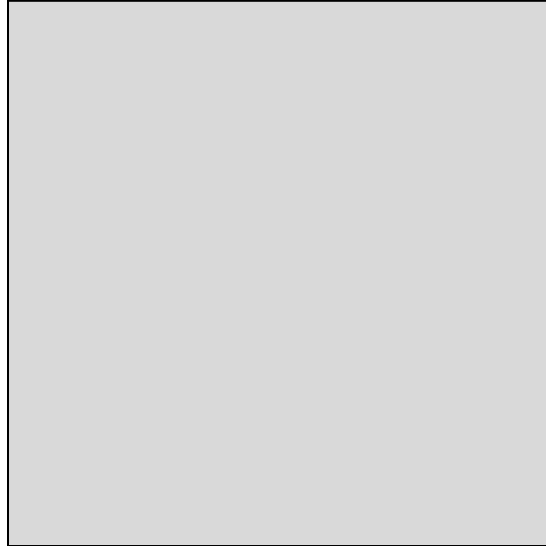


Changes At Work:

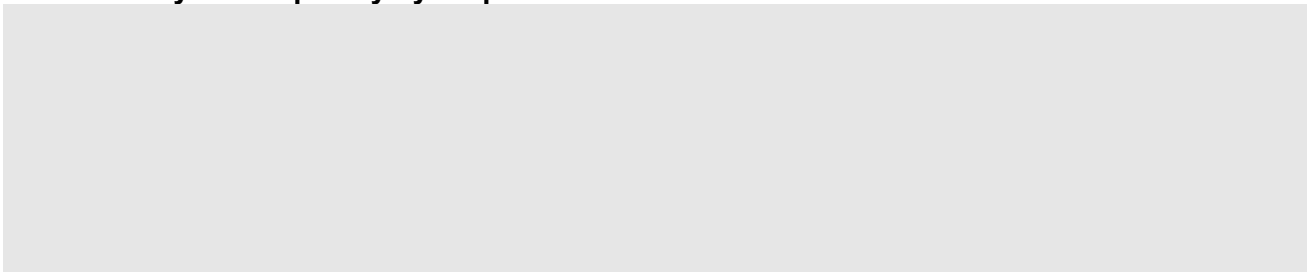
Wanted



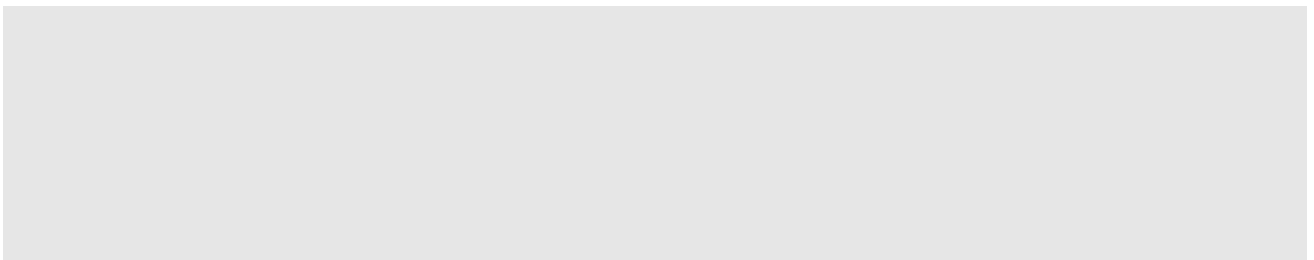
Unwanted



**Among all these changes which do you consider to be unexpected?
Which took you completely by surprise?**



**What are some of the accumulating events in your life - typical day-to-day
events which make you feel angry or stressed?**



Exercise C - The Holmes - Rahe Life Change Scale

The Holmes-Rahe Life Changes study first published in 1967 by Thomas Holmes and Richard Rahe in the "Journal of Psychosomatic Research", assigns points for each life change that were incurred during the past 24 months.

If you have accumulated more than 300 points, there is an 80 percent chance that you will experience a serious change in health within the next twelve months.

If your score varies between 150 and 300 points, there is a 50 percent chance that you will experience a change in health within the next twelve months.

If your score is less than 150 points, there is only a 30 percent chance that you will experience a change in health within the next twelve months.

Why not take a few minutes now to complete **The Holmes-Rahe Life Change Scale** by searching Holmes Rahe on a search engine like Google or Yahoo.

<http://www.google.com>

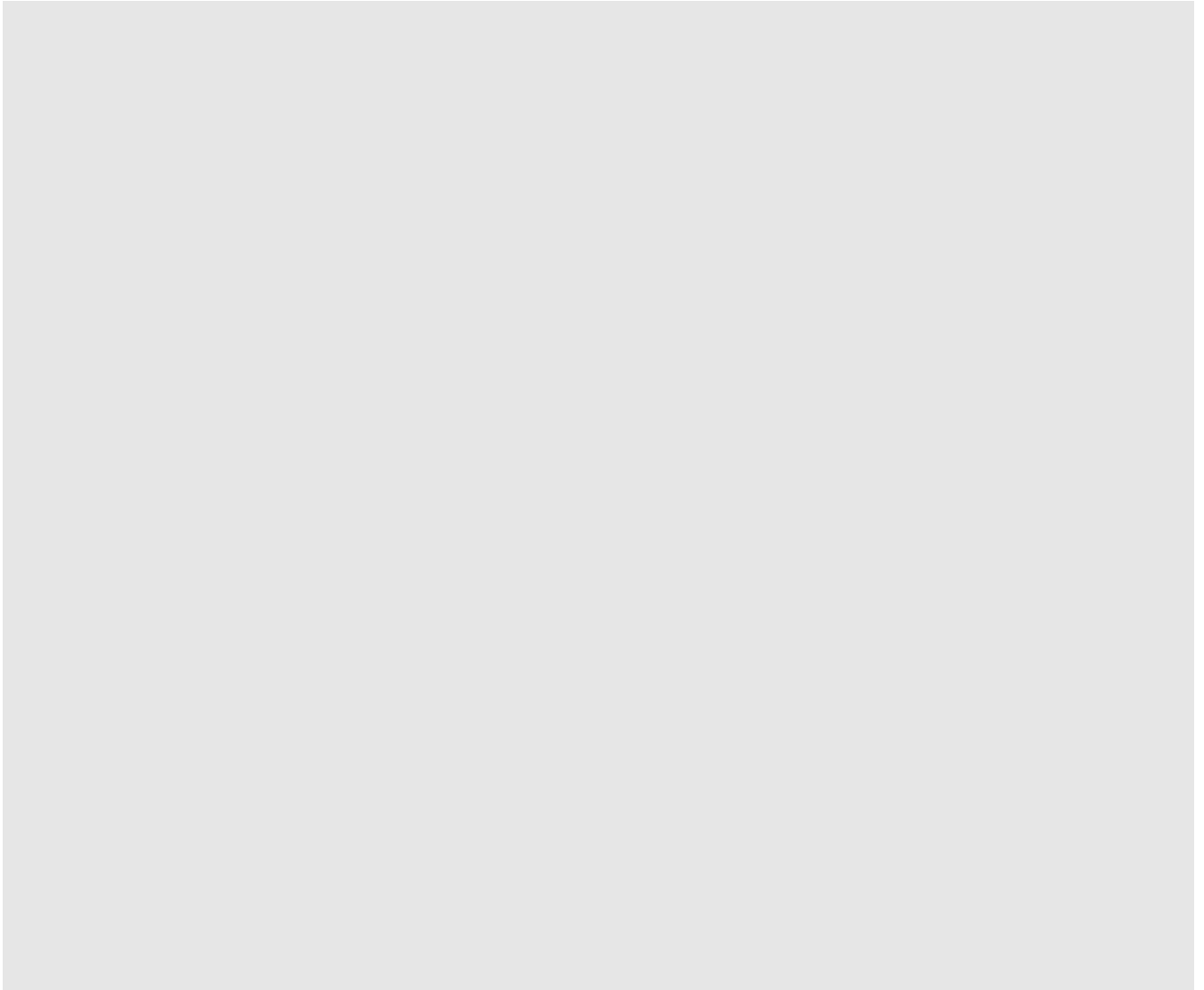
<http://www.yahoo.com>

Once you have completed the survey, enter your score in the space below:

My Holme-Rahe Score:

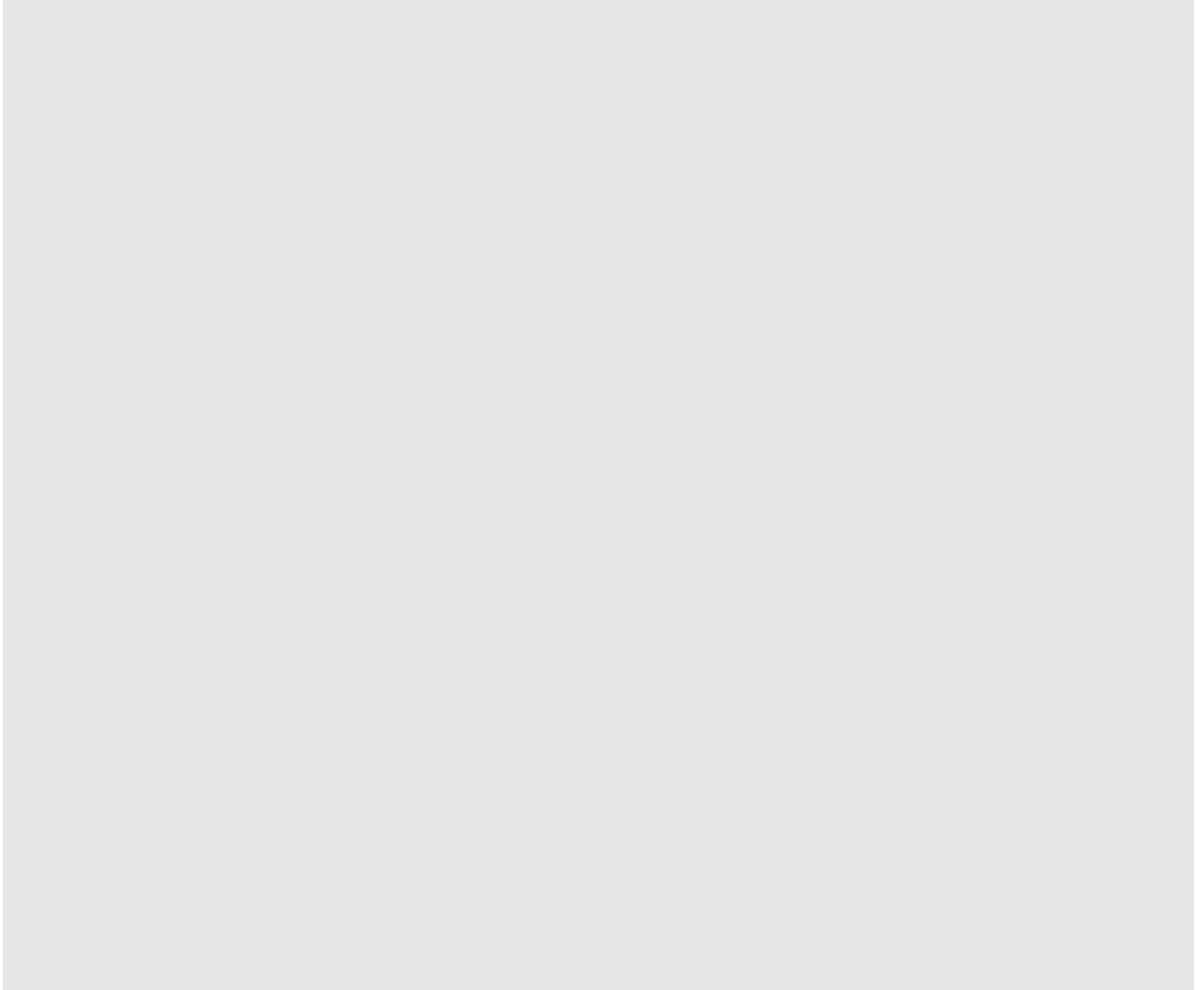
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Exercise D - Changing Your Beliefs

Calming Yourself

Techniques you plan to use to calm yourself on the spot

Affirmations

For each of the 3 beliefs we examined, you will find here an affirmation which we have written. You can use this affirmation if you want or you may re-write your own affirmation in the space provided.

1. The First Belief:

Everybody I meet or contact should like me.

The Affirmation In Our Words:

I am grateful to be liked by quite a few of the people I meet or contact.

Affirmation In Your Words:

2. The Second Belief:

Things should always happen the way I planned it, the way I expect it.

The Affirmation In Our Words:

I am confident that I can adjust to any situation when things don't happen the way I want them or planned them.

Affirmation In Your Words:

3. The Third Belief:

I should worry and become fearful whenever there is change or uncertainty in my life.

The Affirmation In Our Words:

I embrace change, take the necessary action, and refuse to let worry and fear dominate any aspects of my life.

Affirmation In Your Words:

Other Affirmations

Another affirmation you can use by frequently repeating it in your mind when driving or heading for a sales meeting is: I AM, I CAN, I WILL! You can repeat it as is or you can adapt it by adding additional

Before a Sales Meetings:

I am going to have a great meeting, I can make this sale. I will this with all my heart!

Before Tackling Your Prospecting List:

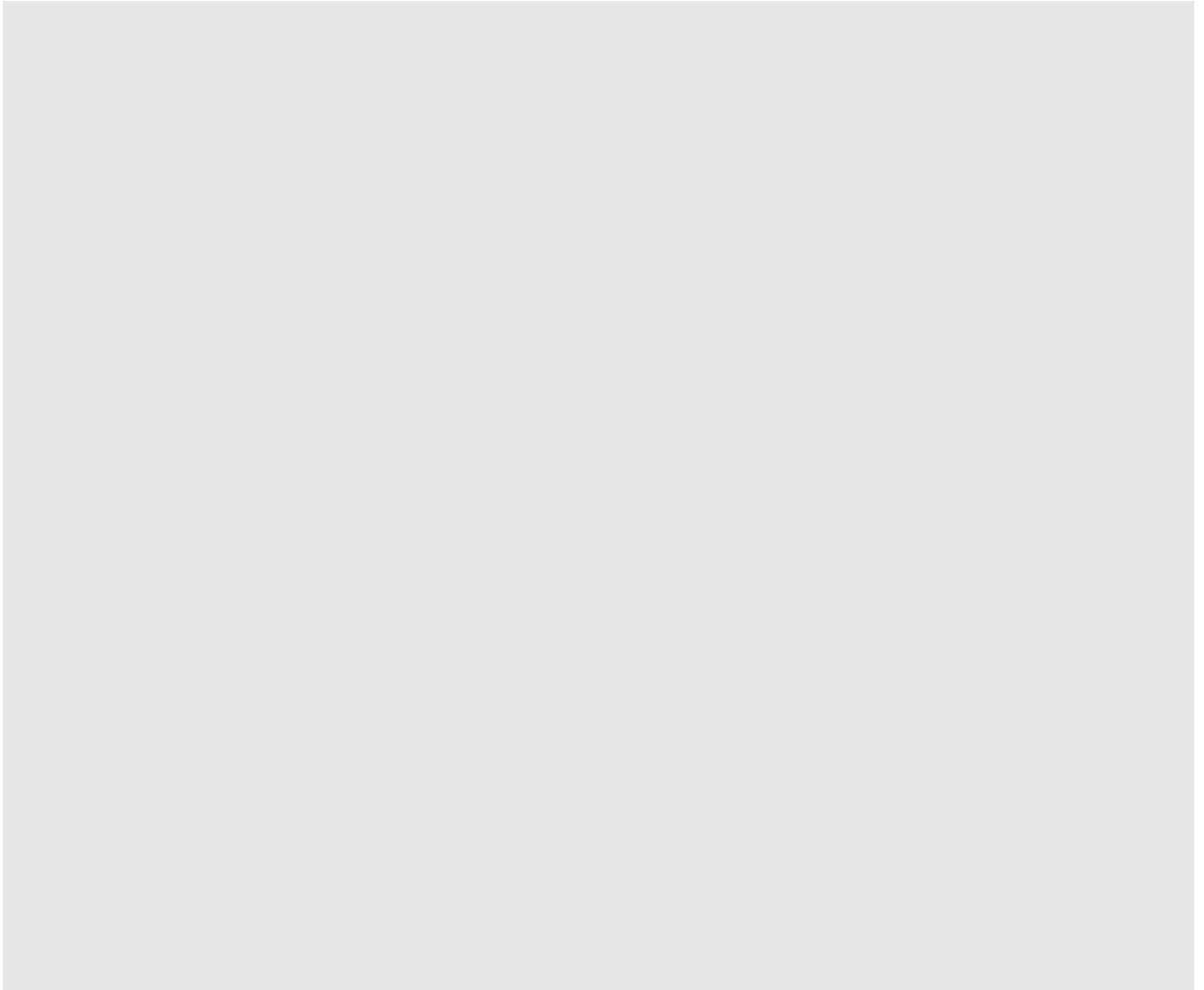
I am attracting the right prospects, I can reach them right now, I will this with all my heart.

Your Affirmations

It is those types of thoughts that bring the confidence and the attitude that attracts success.

[CLICK HERE](#) to view the audio-visual presentation related to this section of the course.

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Exercise E - Managing Stress Effectively

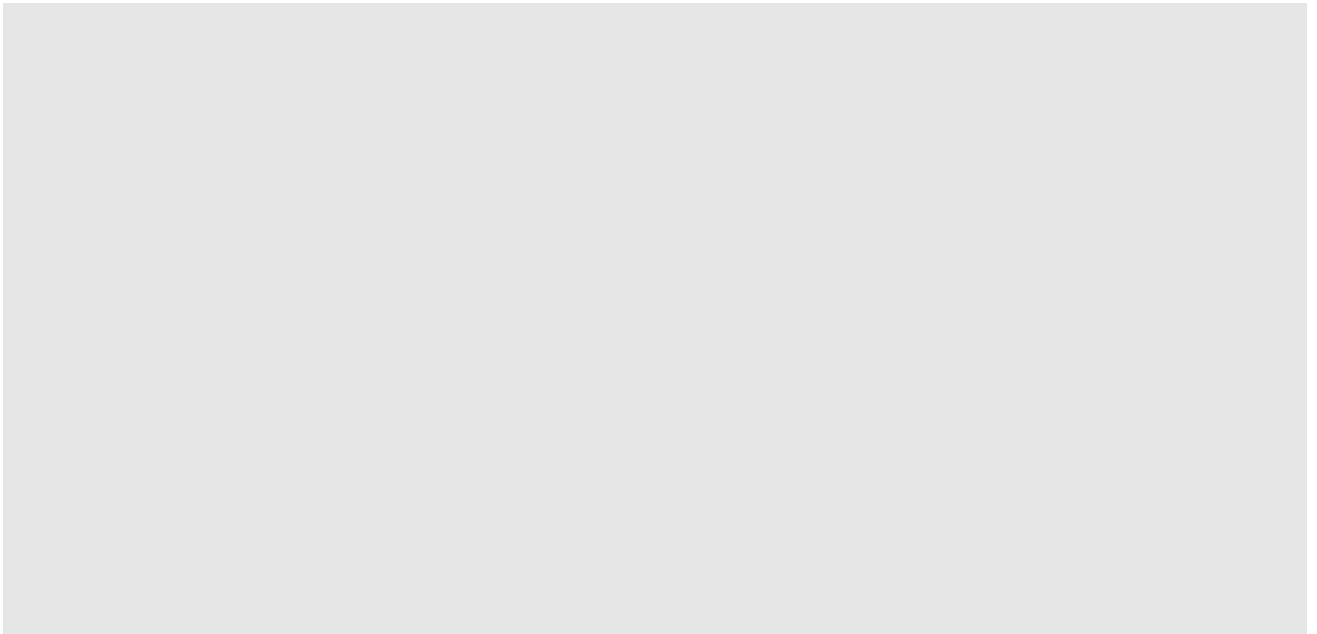
Managing My Life Deep Relaxation Exercise

To help you feel **calm, relaxed and confident** we have prepared for you a guided deep relaxation exercise **which you can listen to regularly**.

We suggest you listen to that exercise at least once daily, preferably first thing in the morning, or alternatively, at the same time every day, before dinner.

To access the Deep Relaxation Exercise: [CLICK HERE](#)

Activities which absorb my total attention



Managing My Life Deep Relaxation and Sleep Exercise

If you are having difficulty sleeping remember to also use **Deep Relaxation and Sleep Exercise** available with this program which you can access by [CLICKING HERE](#)

My Relationships

People who make me feel good about myself, make me laugh, listen to me and are helpful, understanding and supportive. *(Spend more time with them)*

People I feel I would like to develop a better relationship with:

Things I can do to become more selective with what I read, listen to and view

Exercise Activities

Exercise activities I am currently involved in:

New exercising activities I would like to begin:

Eating and Nutrition Habits

Below is a list of eating and nutrition habits. Identify below any habits you are interested in adopting.

Healthy eating habits:

Have a complete nutritious breakfast

Avoid snacking between meals

Eat slowly and only when hungry

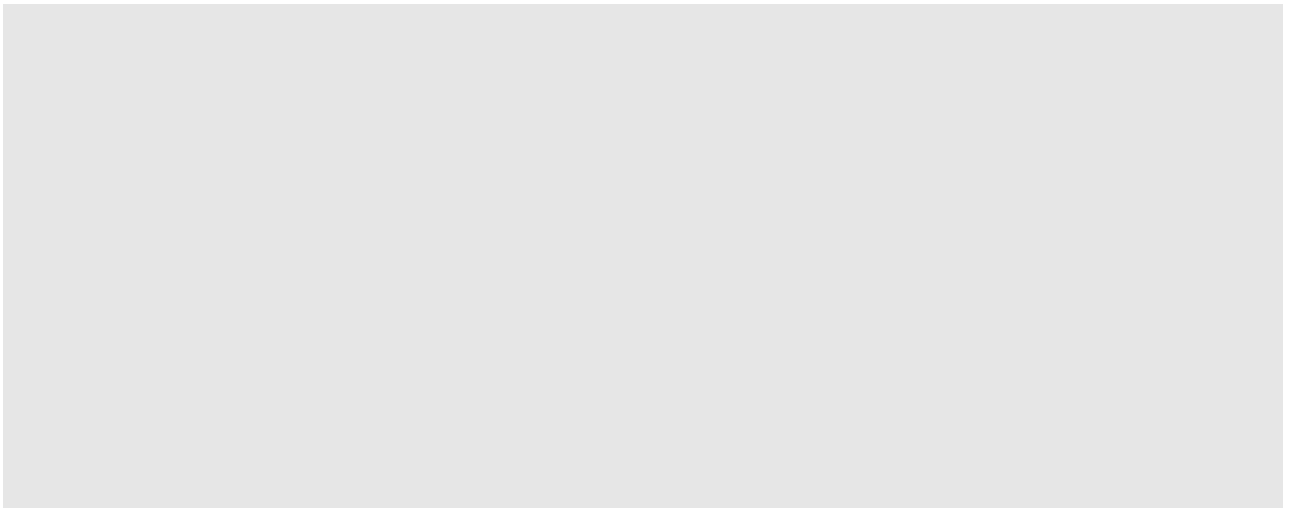
Include in my daily diet a balanced combination of:

- Fruits and vegetables
- Proteins such as meat, eggs, cheese, beans or lentils
- Drink several glasses of water
- Whole grain breads, cereals, rice and pasta
- Milk and milk products such as yogurt and cottage cheese

Moderate or eliminate my intake of:

- Alcohol
- Caffeinated coffee and tea
- Illicit drugs
- Over the counter drugs
- Processed sugar, pastries and confectionaries
- Smoking
- Salt
- Cholesterol

Nutrition Habits I Am Interested in Adopting:



About The Author

George Beshara

George Beshara is the author of the Leading by Managing My Life series of programs published by the Managing My Life Institute and distributed by G.O.L.E.A.D a not for profit organization based in Montreal, Canada.



As a Business Coach, George has a proven record of leading small businesses and entrepreneurs to always grow their business intelligently.

Involved in training, coaching and publishing since 1983 a few of George's accomplishments include:

- Provided business coaching solutions to a large number of clients helping them launch and maintain very successful businesses.
- Established a highly successful career transition coaching practice with corporate clients including Royal Le Page, Swiss Bank Canada, The Foresters, Employment and Immigration Canada, CIBC Wood Gundy, Ontario Government, Molson, and Eaton's among many others.
- Custom-developed training programs which were delivered nationally to a large number of corporate clients.
- Authored more than 11 Managing My Life programs which have been used with more than 100,000 individuals worldwide.
- Author of Experiencing The Winning Edge.

For more information please visit:

<http://www.go-lead.org>



The Stepping-Up Approach To Business Success

EXPERIENCING THE WINNING EDGE *MODULE FOUR* MAINTAINING A HIGH LEVEL OF ENTHUSIASM AND SELF-CONFIDENCE

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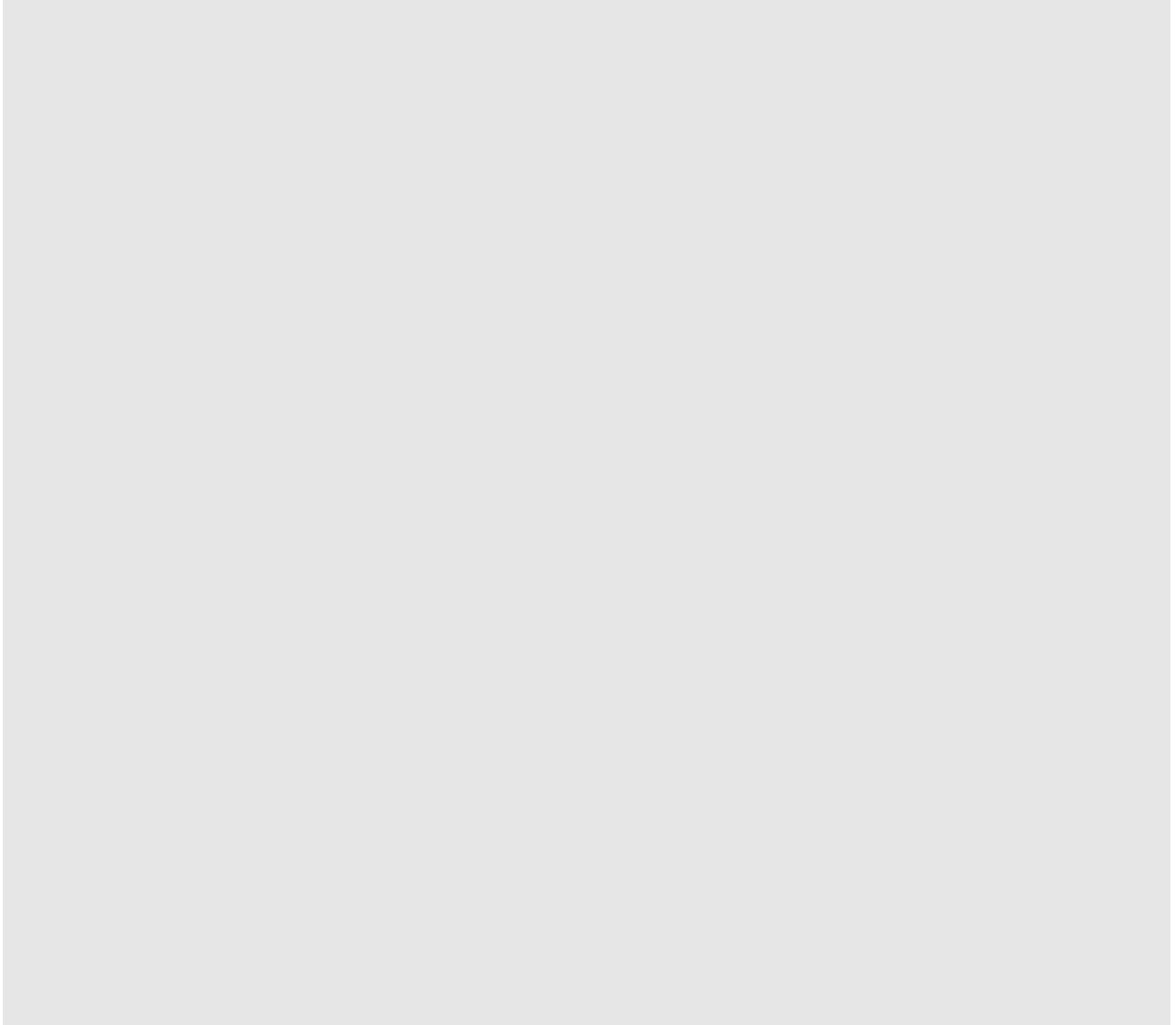
Objectives of Module Four:

As a result of completing this Module, you should be prepared to answer the following questions:

1. How would you define enthusiasm?
2. Why is enthusiasm so important in sales?
3. How can we develop enthusiasm?
4. How do we define and recognize our accomplishments?
5. What are motivators?
6. Explain Maslow's hierarchy of needs.
7. List here the 12 key motivators related to the Social Motives Theory
8. What is the relationship between knowing our strengths and enthusiasm?
9. What are the 4 steps involved in integrating this knowledge?

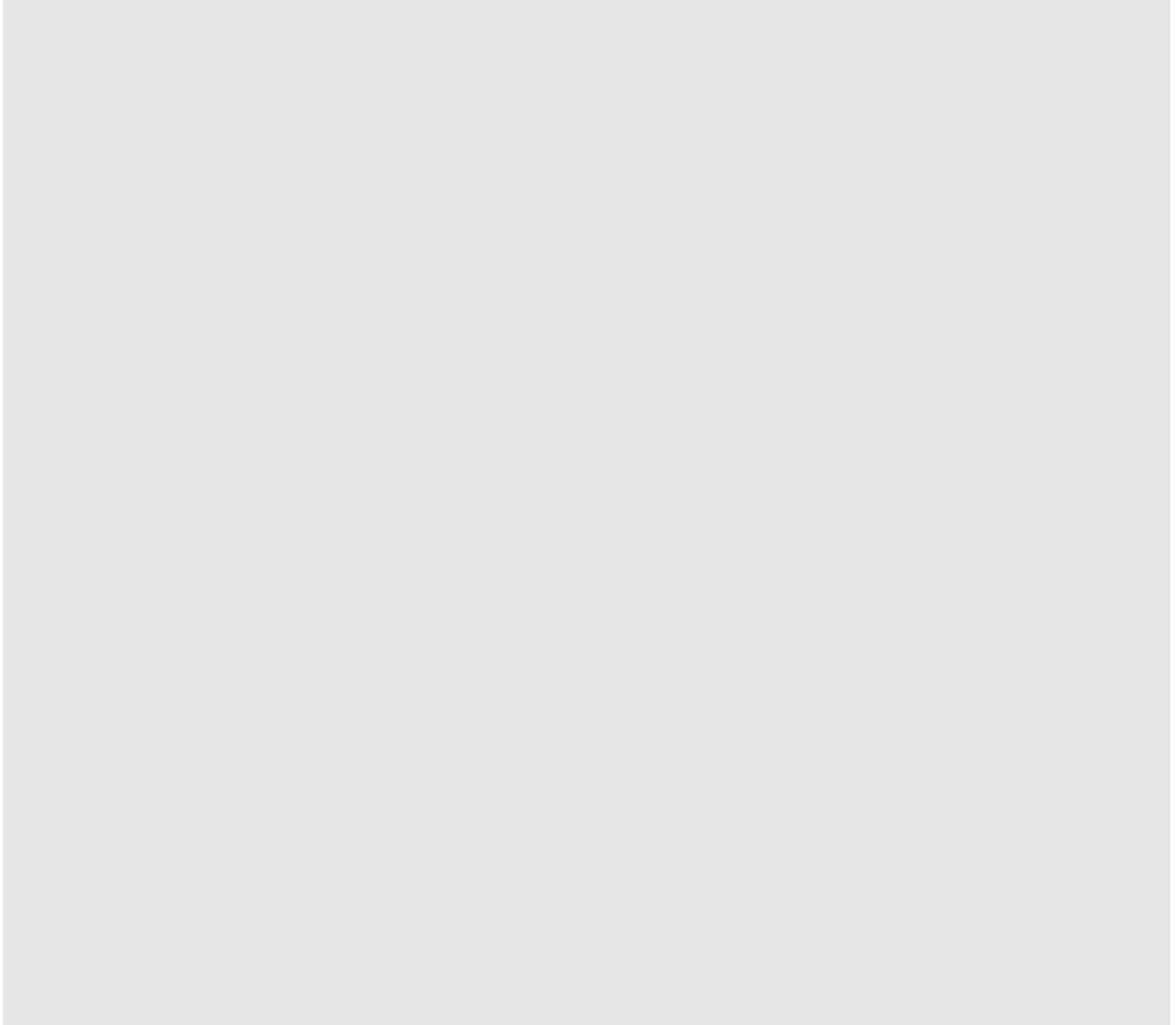
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Exercise A - Your Accomplishments

Accomplishments are simply the results of activities that were completed or that we were involved in, that gave us feelings of satisfaction, pride, joy, or even relief.

Action words help us understand our accomplishments. For example:

At Work:

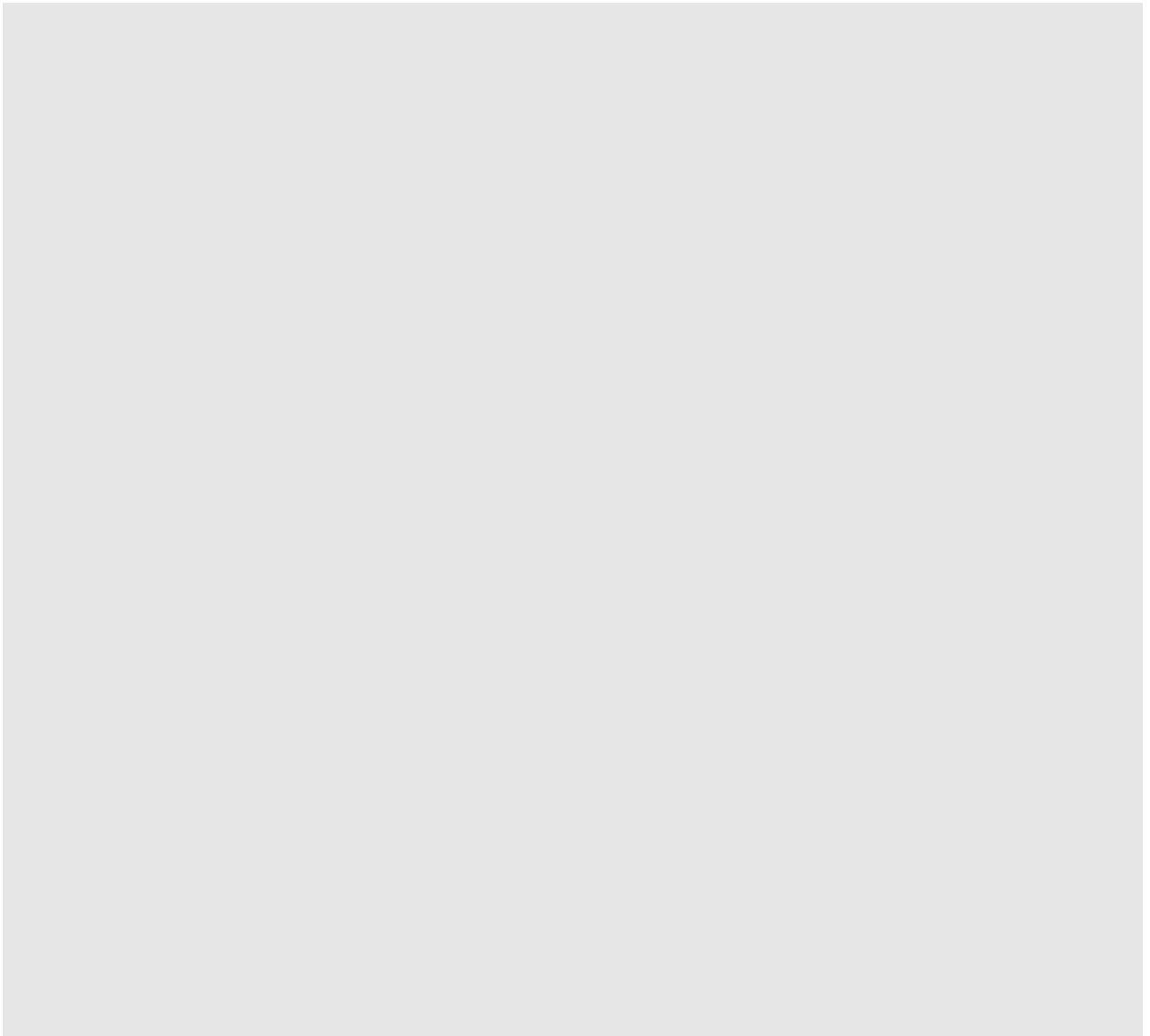
- **Learned** a new computer program in record time
- **Resolved** difficult customer complaint to everyone's satisfaction
- **Succeeded** in convincing senior management of new customer service strategy
- **Learned** to stay calm and composed when dealing with difficult customers
- **Completed** quality work on a regular basis
- **Increased** retention of customers by 20 percent over previous year with same complement of staff
- **Implemented** a positive employee relations program
- **Met** department goals and objectives under difficult conditions
- **Made** my boss laugh today
- **Received** a congratulatory letter from one of my subordinates

Personal Life:

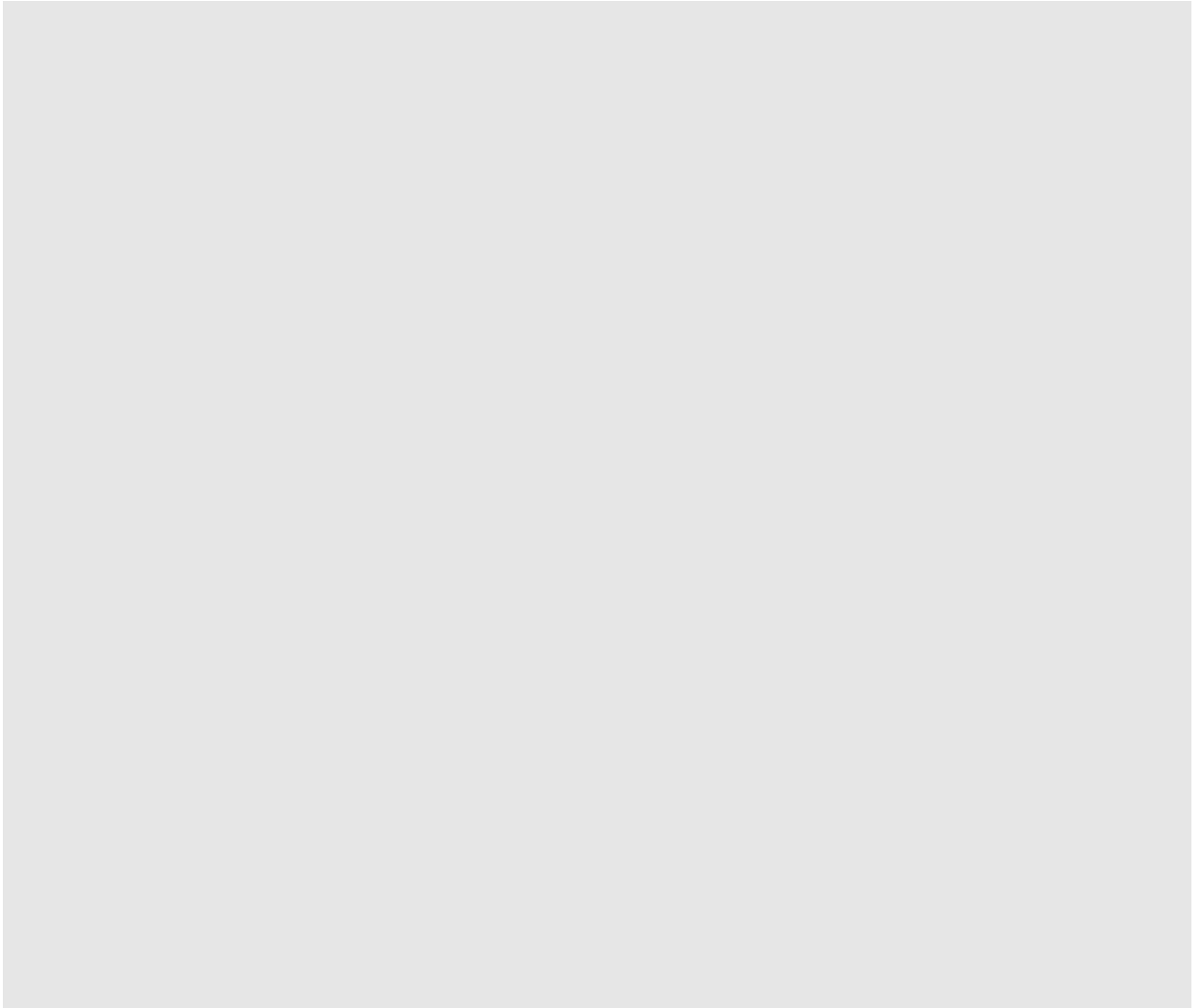
- **Volunteered** actively at the local community centre
- **Redecorated** the house within budget
- **Started** working on completing my Masters degree
- **Improved** relationship with spouse
- **Completed** a house improvement project

Identify Your Accomplishments

From Work - 12 or more accomplishments

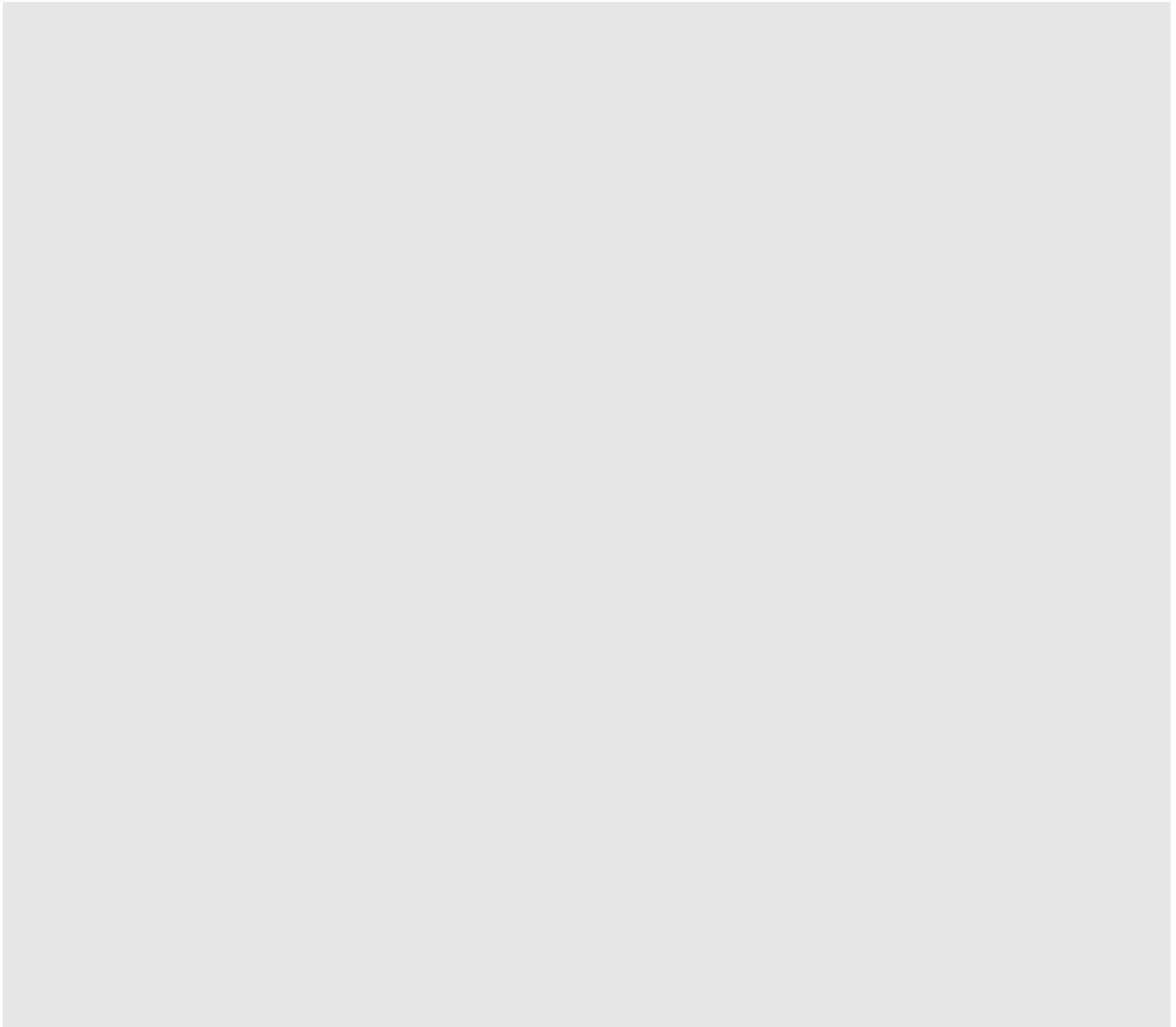
A large, empty light gray rectangular box intended for the user to list their accomplishments from work. It occupies the majority of the page below the instructions.

From Your Personal Life - 6 or more accomplishments

A large, empty light gray rectangular box, intended for the user to list their six or more personal accomplishments. The box is solid gray and occupies the central portion of the page.

[CLICK HERE](#) to view the audio-visual presentation related to this section of the course.

Notes and Key Points to retain from this section of the course:



Exercise B - Identifying Your Motivators

This exercise is concerned with identifying your key motivators.

On the right-hand side, write in 12 of your most significant accomplishments. Once you have written down your accomplishments, use the list of motivators at the bottom of the page to identify up to five motivators for each accomplishment, by putting an x in the appropriate columns. Add up the totals for each column. The four motivators with the highest recurrence are the ones that are important to you and the ones you will want to focus on. Circle them accordingly from among the list of motivators below.

Motivators:

1 2 3 4 5 6 7 8 9 10 11 12 *Accomplishments from work*

	1
	2
	3
	4
	5
	6
	7
	8
	9
	10
	11
	12

1 2 3 4 5 6 7 8 9 10 11 12 *Accomplishments from your personal life*

	1
	2
	3
	4
	5
	6

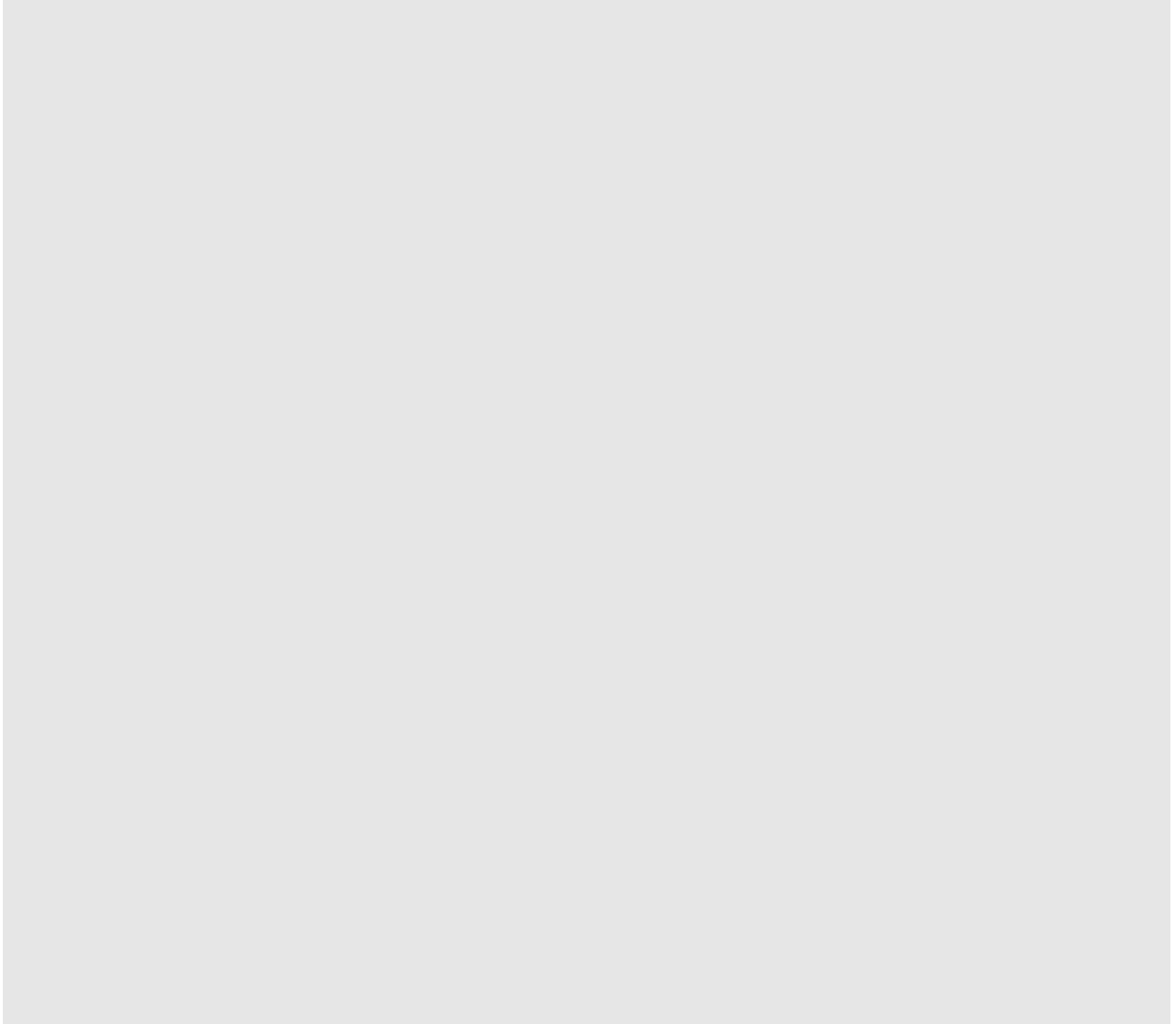
Total

Motivators:

- | | | |
|---|---------------------------------------|-----------------------|
| 1. Learning | 5. Receiving recognition | 9. Leading others |
| 2. Being creative | 6. Expressing yourself | 10. Organizing |
| 3. Taking calculated risks | 7. Being listened to | 11. Making decisions |
| 4. Analyzing problems/
finding solutions | 8. Socializing/working
with others | 12. Competing/winning |

[CLICK HERE](#) to view the audio-visual presentation related to this section of the course.

Notes and Key Points to retain from this section of the course:



Exercise C - Strengths and Rating System

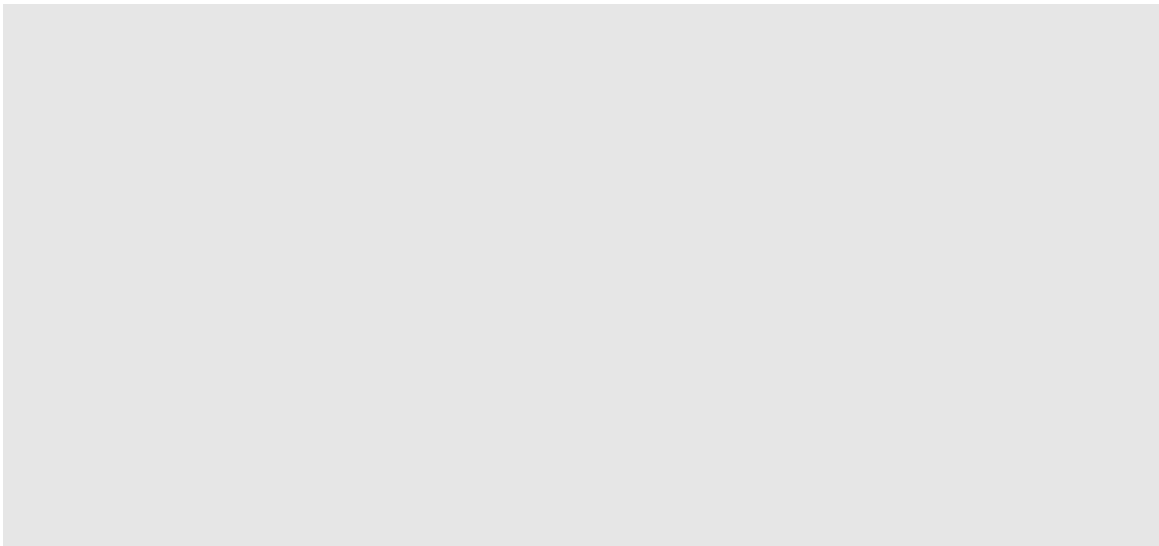
Knowing our strengths helps us build our self-confidence and helps us deal with the criticism of others. Knowing our strengths also makes us respond more enthusiastically to opportunities that arise.

The following list of strengths will help you identify some of your own personal strengths. As you go down the list, identify in the appropriate space below the ones that you feel describe you most of the time or often.

Strengths:

Enthusiastic	Patient	Thoughtful	Efficient
Trusting	Supportive	Open-minded	Good sense of humor
Optimistic	Hard-working	Perceptive	Organized
Responsible	Cautious	Confident	Communicative
Understanding	Dependable	Sharp	Cooperative
Friendly	Thorough	Self-starter	Decisive
Relaxed	Determined	Alert	Assertive
Intuitive	Flexible	Ambitious	Aggressive
Sensitive	Talkative	Serious	Adaptable
Logical	Persistent	Tactful	Outspoken
Tolerant	Loyal	Quick-minded	Imaginative
Opportunistic	Sincere	Calm	Sociable
Curious	Systematic	Energetic	Easy-going
Firm	Versatile	Generous	Adventurous
Polite	Outgoing		

Strengths that You Feel Describe You Most of the Time or Often



One way to ensure that this subjective way of identifying strengths is accurate is to reduce your list to 12 strengths from among the ones you've rated above. To do this you need to carefully review all the strengths you identified until you have selected and circled 12 among them that you feel represent you best. Take a few minutes to do this now and then list the 12 key strengths you have identified in the appropriate space on page 16 of your workbook.

Exercise D - Accomplishments and Strengths

In this exercise you will identify strengths that you utilized to make some of your accomplishments happen. First, in the left-hand column, write up to five of your accomplishments from Exercise A. Then, in the right-hand column, identify the corresponding strengths. For example, if you learned a new computer program in record time, your strengths could be: fast learner, sharp, thorough, patient, logical, systematic, and so on. Identify in this exercise, additional strengths that you have not already listed on page 13 - and transcribe these strengths to the appropriate space on the right of page 16.

Work-Related Accomplishments

Strengths used:

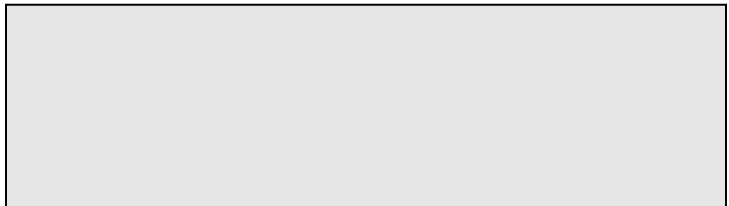
1)



2)



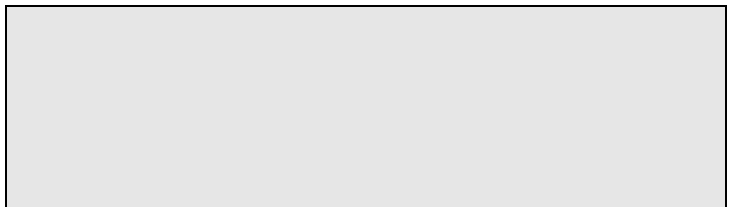
3)



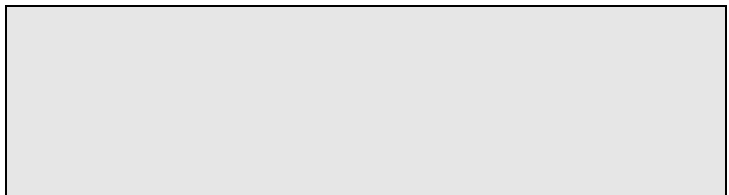
Personal Life Accomplishments

Strengths used:

1)

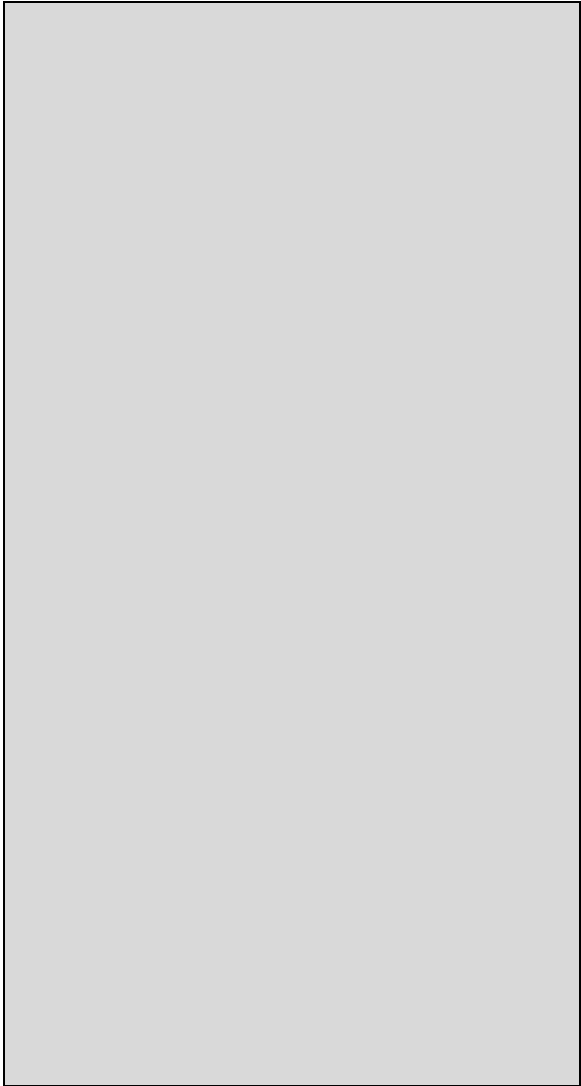


2)

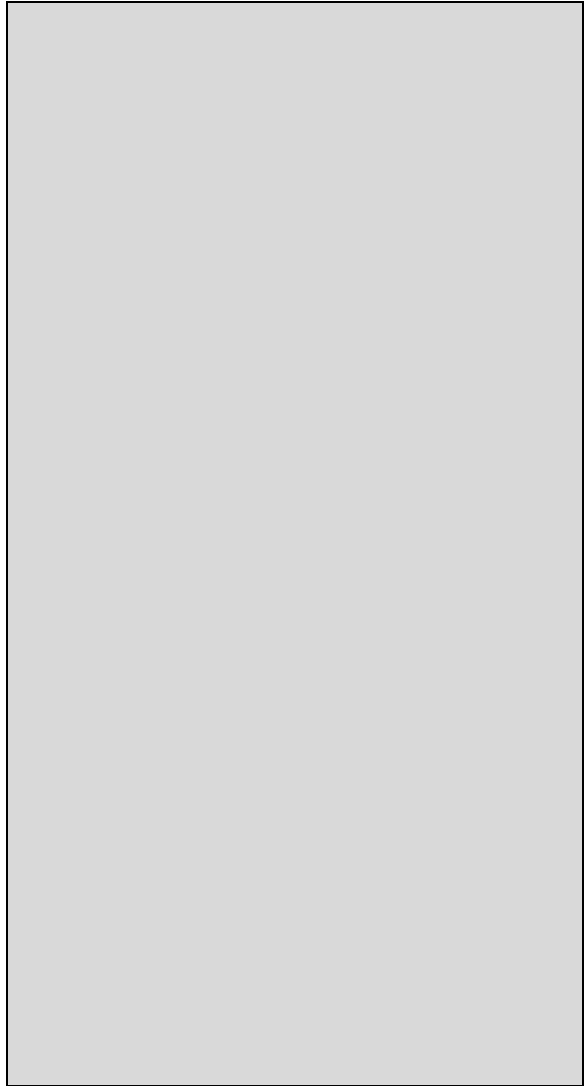


Exercise E – Your List of Strengths

12 key strengths (From Exercise C)

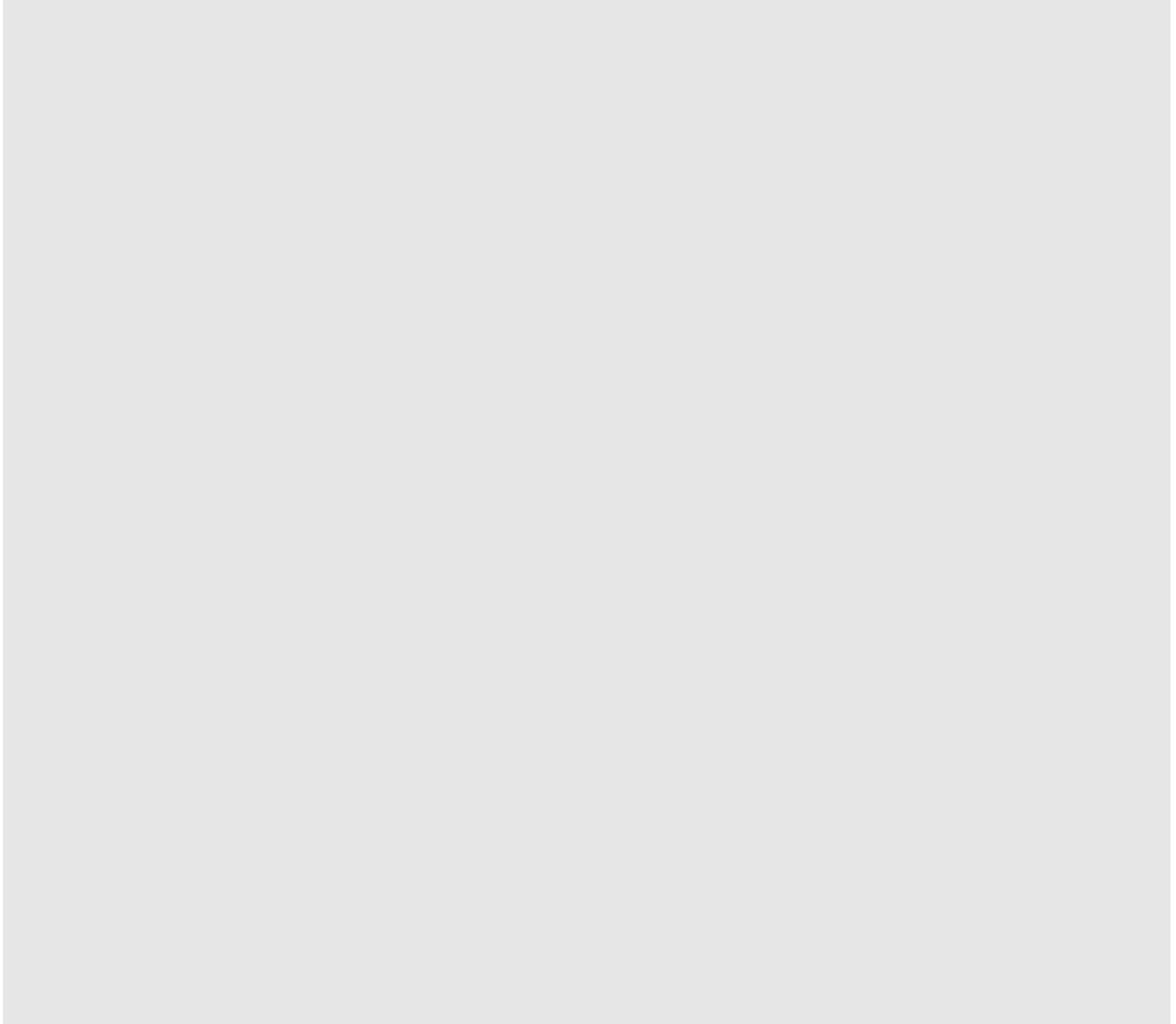


Additional Strengths
(From Exercise D)



[CLICK HERE](#) to view the audio-visual presentation related to this section of the course.

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Exercise G - Integrating This Knowledge In Your Life

We propose that you use the *Inventory of My Accomplishments and Motivators* available on the next page of your workbook, every day for at least the next 30 days.

Using the handout, do the following:

- Make a list of what you accomplished each day. Remember to use action words and remember that accomplishments are simply activities that you've been involved in or that you've completed, that gave you a feeling of satisfaction, pride, joy or even relief.

Making a list at the end of each day reinforces the fact that positive things are happening to you every day. And that the little pieces of success that you have every day will lead to bigger things in the long run.

- Identify which of your key motivators were fulfilled that day. As mentioned earlier, it's very important to make sure that you're regularly involved in things you enjoy doing and which motivate you. If you are not, you lose interest, you procrastinate, you watch TV, and you lose out on so many opportunities.
- Write down at least one activity and preferably two, which you can do at work or outside work the next day that will help you more effectively, fulfill your key motivation needs. It can be a very small thing, or a more major undertaking. Remember, being enthusiastic requires making sure that you are doing things which motivate you, things you enjoy.
- Read over your list of strengths. In fact, it's important to do this 2 or 3 times a day. It's good for you to know your strengths by heart, to believe in yourself so much, that the next time changes are happening or someone criticizes you, you won't become defensive and you won't lose your enthusiasm. The next time an opportunity comes up, you won't let your fears take over. You'll remember your strengths and jump into the situation wholeheartedly. By reading your list of strengths regularly, you become increasingly confident. You start to feel that you can do just about anything if you really wanted to. Your fears start to leave you and your enthusiasm takes over.

Once you're organized, this will take you only ten to fifteen minutes a day. This is really not much of an effort to revitalize yourself, to ensure that you maintain that spark of enthusiasm.

After you've done this for 30 days, you'll realize how enjoyable these ten minutes have been, and you'll probably continue the habit.

Daily Inventory of My Accomplishments and Motivators

Today's Date:

1. Accomplishments today:

2. My four primary motivators are: Things I did today to satisfy these
motivators:

3. Activities I can do tomorrow to satisfy my motivators: *(personal or at work)*

4. Number of times today I read my list of strengths:

About The Author

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The Stepping-Up Approach To Business Success

EXPERIENCING THE WINNING EDGE *MODULE FIVE* *MANAGING MY TIME AND USING TECHNOLOGY MORE EFFECTIVELY*

A Gift from G.O.L.E.A.D.

Montreal, Quebec, Canada



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Course Materials updated March 2025

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Produced in Canada

Experiencing The Winning Edge

Table of Content

- 1 Introduction: Positioning Yourself for Success in These Challenging Times
- 2 Goal-Setting and Taking Action
- 3 Managing Stress and Maintaining a Positive Attitude
- 4 Maintaining a High Level of Enthusiasm and Self-Confidence.
- 5 Managing Your Time and Using Technology More Effectively.**
- 6 Identifying Your Best Target Markets.
- 7 Building Relationships.
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Management Team
G.O.L.E.A.D.

Introduction

Please take a minute to view the following very short introductory audio-visual presentation which highlights the skills that very successful entrepreneurs and sales professionals excel at by:

[CLICKING HERE](#)

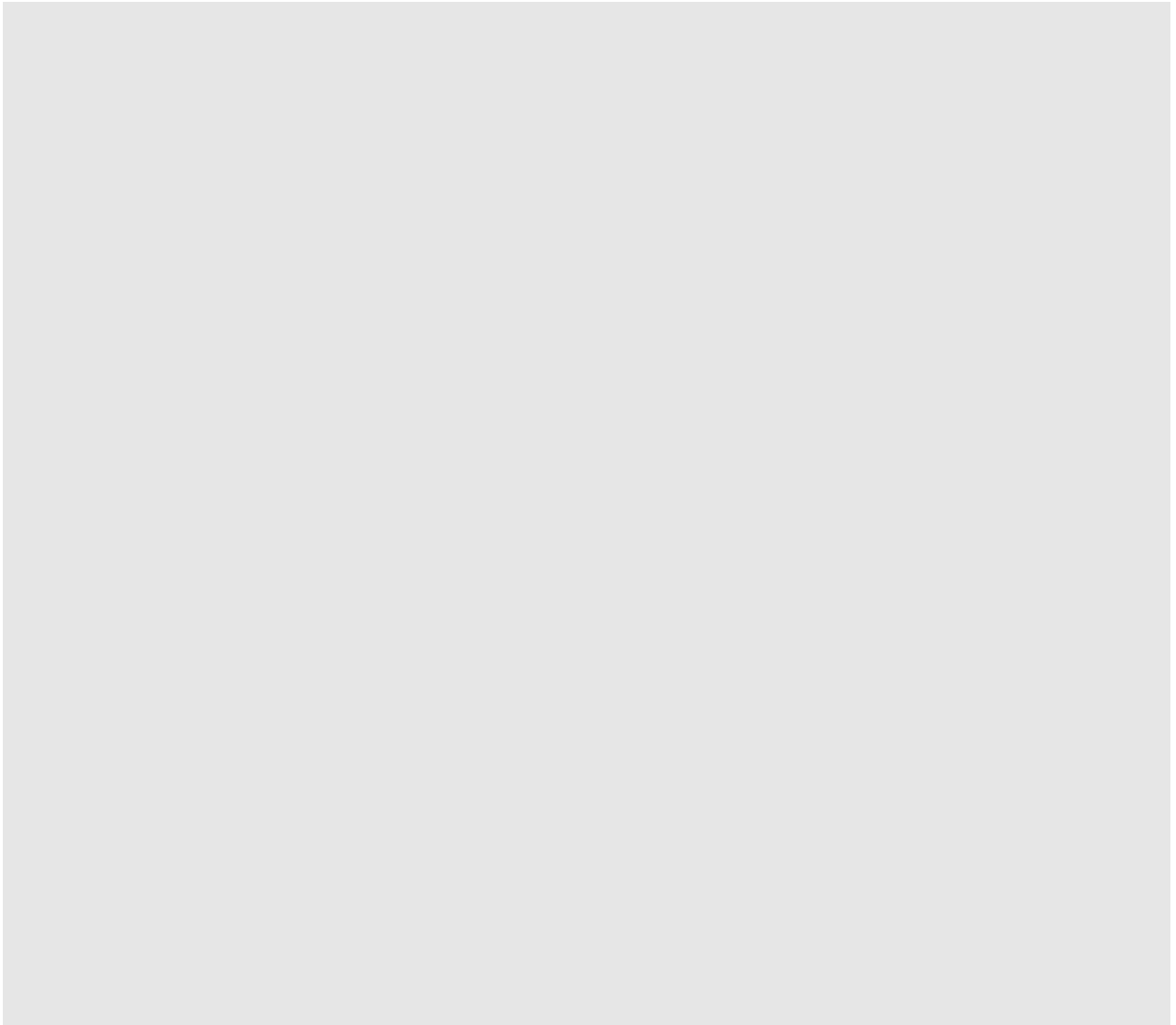
Objectives of Module Five:

As a result of completing this Module, you should be prepared to answer the following questions:

1. What are the laws behind managing our time?
2. What are the benefits of managing our time?
3. What are some of the skills related to managing our time?
4. What are the 7 questions we can ask ourselves if we want to really change some of our habits?
5. What are the typical things that lead to time wastage?
6. What are some the things that you can to manage time more effectively?

[CLICK HERE](#) to view the audio-visual presentation related to this section of the course.

Notes and Key Points to retain from this section of the course:



Understanding The Dynamics of Time

Exercise A ~ Your Time Managing Skills

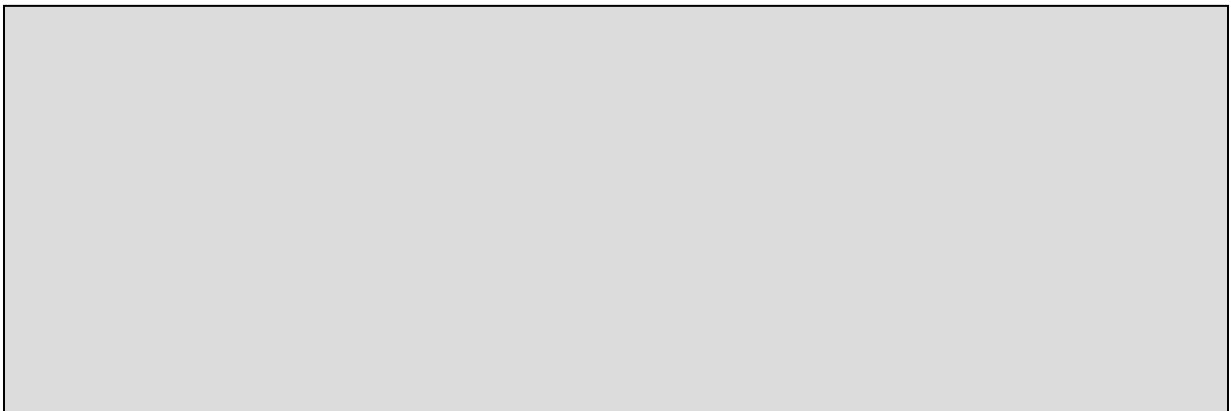
List of Skills

Methodical/Systematic	Organized
Focused on goals and priorities	Able to concentrate on each task
Assertive	Good listener
Communicative	Good planning skills
Good decision-maker	Good people skills
Determined/Persistent	Energetic
Logical	Dependable
Patient	Self-starter
Good scheduling skills	Ability to concentrate

Time Managing Skills I Already Excel At



Time Managing Skills I Do Need To Improve



Identify in sections 1 and 2 of your **Personal Profile** at the end of your workbook, up to 5 time management skills that you already excel at and up to 5 time management skills that you feel you need to improve.

Exercise B ~ Our Time — Where does it go?

At Work: To help you complete this exercise, review your job description, your daily calendar, and the suggestions list which is available on page 11 of your workbook.

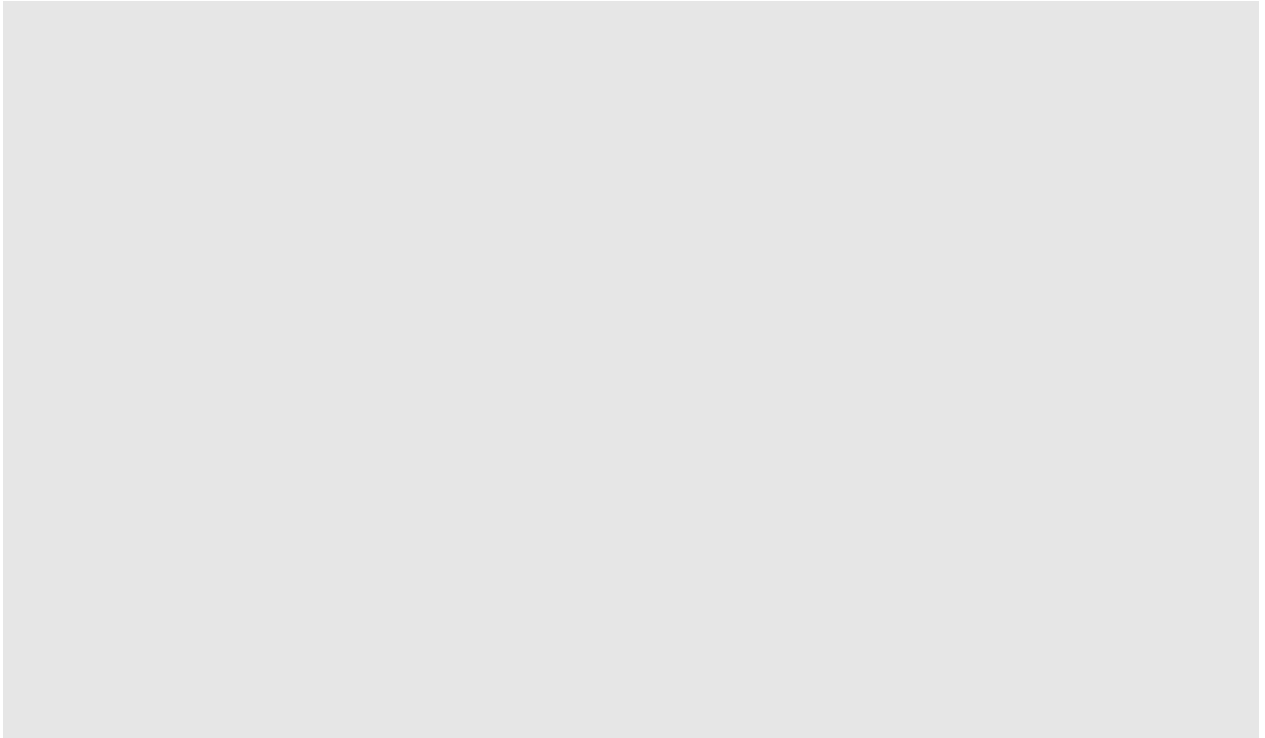
Indicate here you main 15 work activities and the time you spend approximately on each activity every month

From among those activities which are the ones that you enjoy doing most?

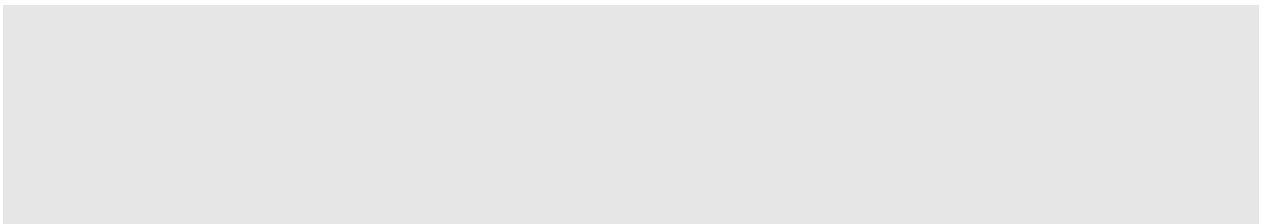
From among those activities which are the ones you enjoy doing least?

In Your Personal Life: To help you complete this exercise, review your daily calendar, and the suggestions list which is available on the next page of your workbook.

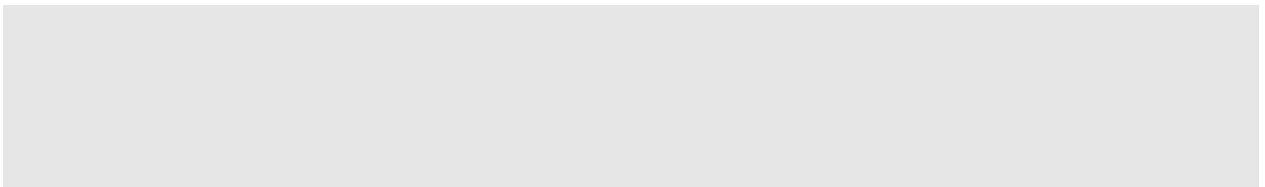
Indicate here you main 15 outside of work activities and the time you spend approximately on each activity every month



From among those activities which are the five that you enjoy doing most?



From among those activities which are the ones you enjoy doing least?



Identify in sections 3 and 4 of your **Personal Profile** your 12 of most time consuming responsibilities at work and the 6 most time consuming activities in your personal life

Example Responsibilities

Work Responsibilities

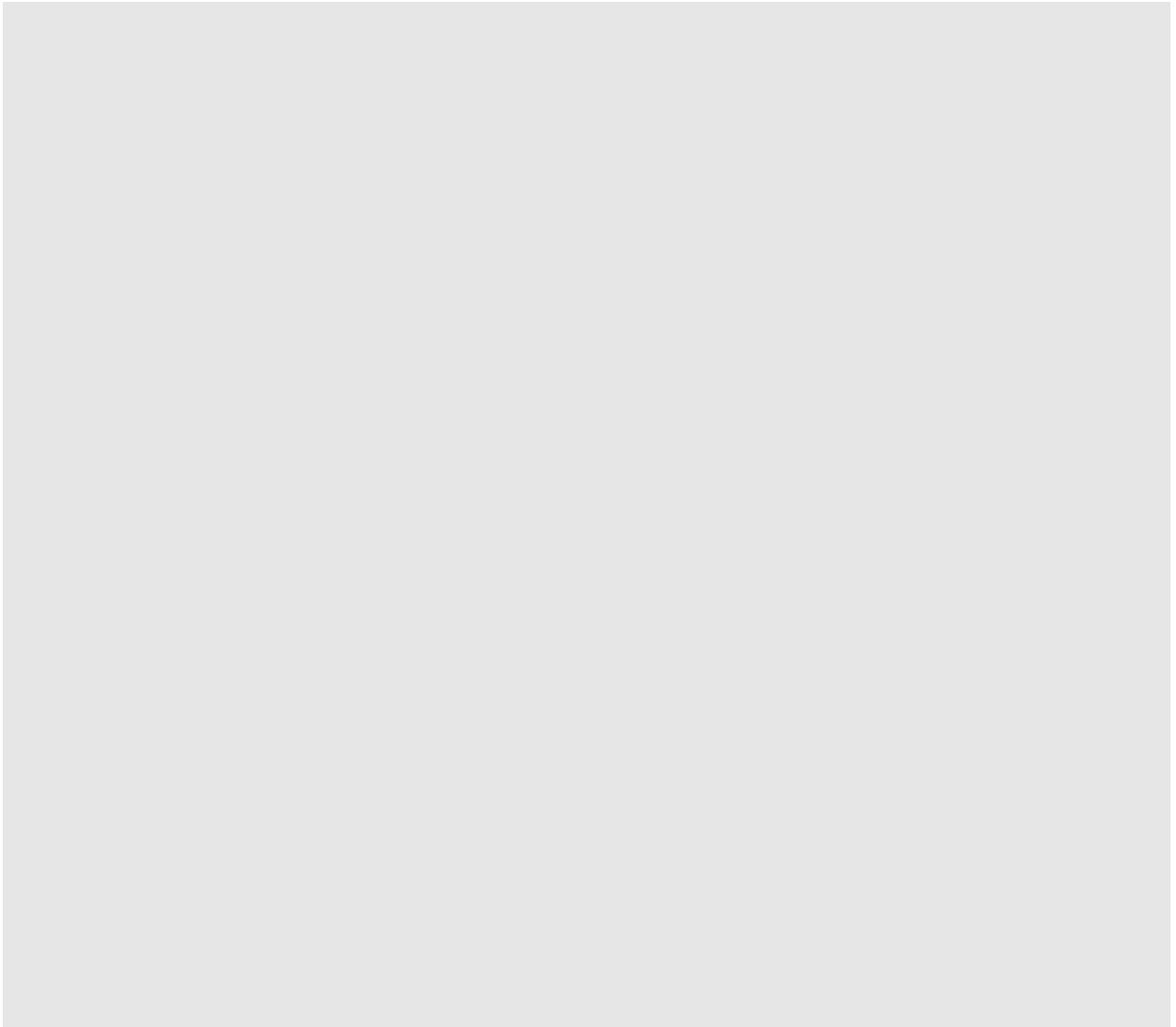
- Make telephone calls
- Filing
- Paperwork
- Researching
- Organizing my time
- Department meetings
- Meetings with clients
- Prospecting for new clients
- Responding to e-mails
- Writing memos
- Trouble-shooting
- Planning work
- Budgeting
- Writing reports
- Internet research
- Follow-up with existing clients
- Compiling information for reports
- Supervising others
- Monitoring others' jobs
- Training others
- Preparing presentations
- Making presentations
- Typing letters
- Dictating letters
- Learning new software
- Ordering supplies
- Taking inventory
- Scheduling work
- Handling complaints

Responsibilities and Activities In Your Personal Life

- Travelling to work
- Preparing meals
- Personal hobbies
- Spending time with children
- Grocery shopping
- Laundry
- Visits with friends
- Completing course of study
- Personal hygiene
- Sports
- Television
- Movies
- Going out to dinner
- Weekend getaways
- Driving children to school
- Sleeping
- Feeding children
- Visiting relatives
- Visiting friends
- Cultural events

[CLICK HERE](#) to view the audio-visual presentation related to this section of the course.

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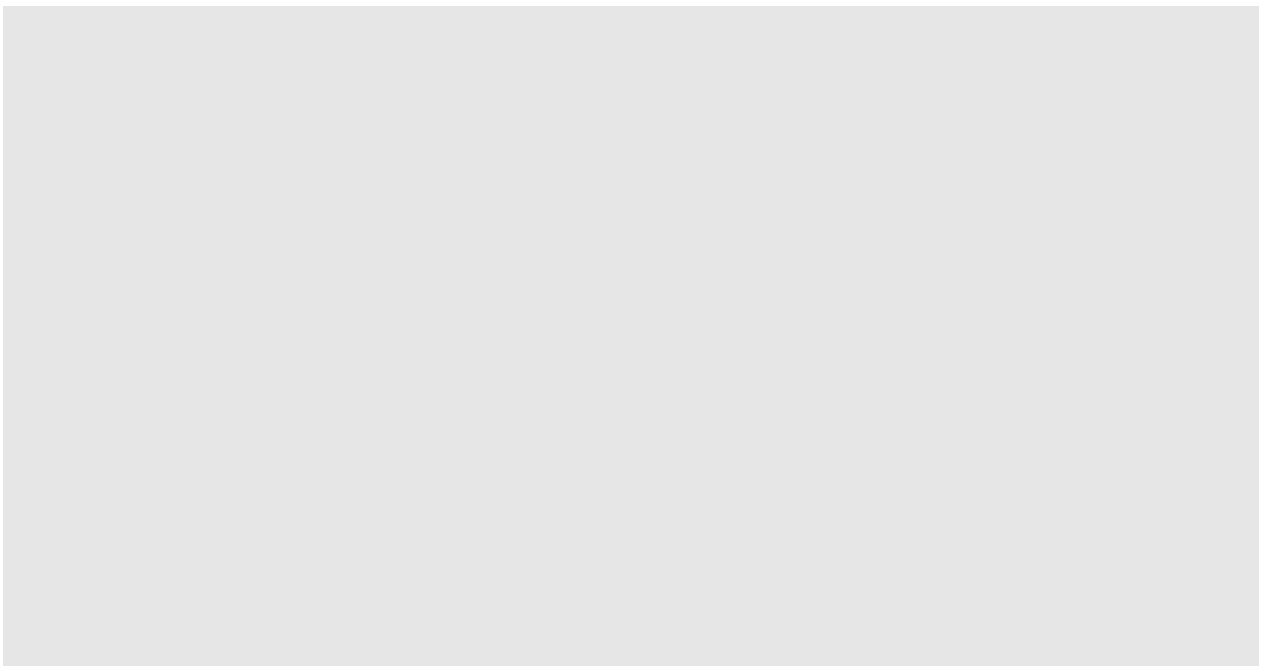


Exercise C ~ Our Time — How do we waste it?

Example List of Time Wasters:

- Lack clear goals and objectives
- I don't plan sufficiently
- Reluctant to delegate responsibility
- Lack priorities
- Difficulty concentrating
- Lunches are too long
- Try to do too much at once
- Have a hard time saying no
- Underestimate time requirements
- Unchallenged/bored by my work
- Don't receive enough feedback
- Too many telephone interruptions
- Others' mistakes need to be corrected
- Too much time training new staff
- Others don't keep their appointments
- Others I need to contact are unavailable
- Too much red tape
- Given responsibility without authority
- Watch too much TV
- Tend to procrastinate
- Make mistakes that need to be corrected
- Lack self-discipline
- Spend too much time socializing
- Too many coffee breaks
- Too much time on pet projects
- Talking too much
- Being overly optimistic
- Don't listen carefully enough
- Make decisions which are not thought through
- Decisions are often postponed by others
- Unnecessary or too lengthy meetings
- Too many visitors/interruptions
- Too much time supervising staff
- Others arrive late for appointments
- Too much junk mail/e-mail
- Not given enough information to complete job
- Too much of an open door policy
- Spend too much time on the Internet

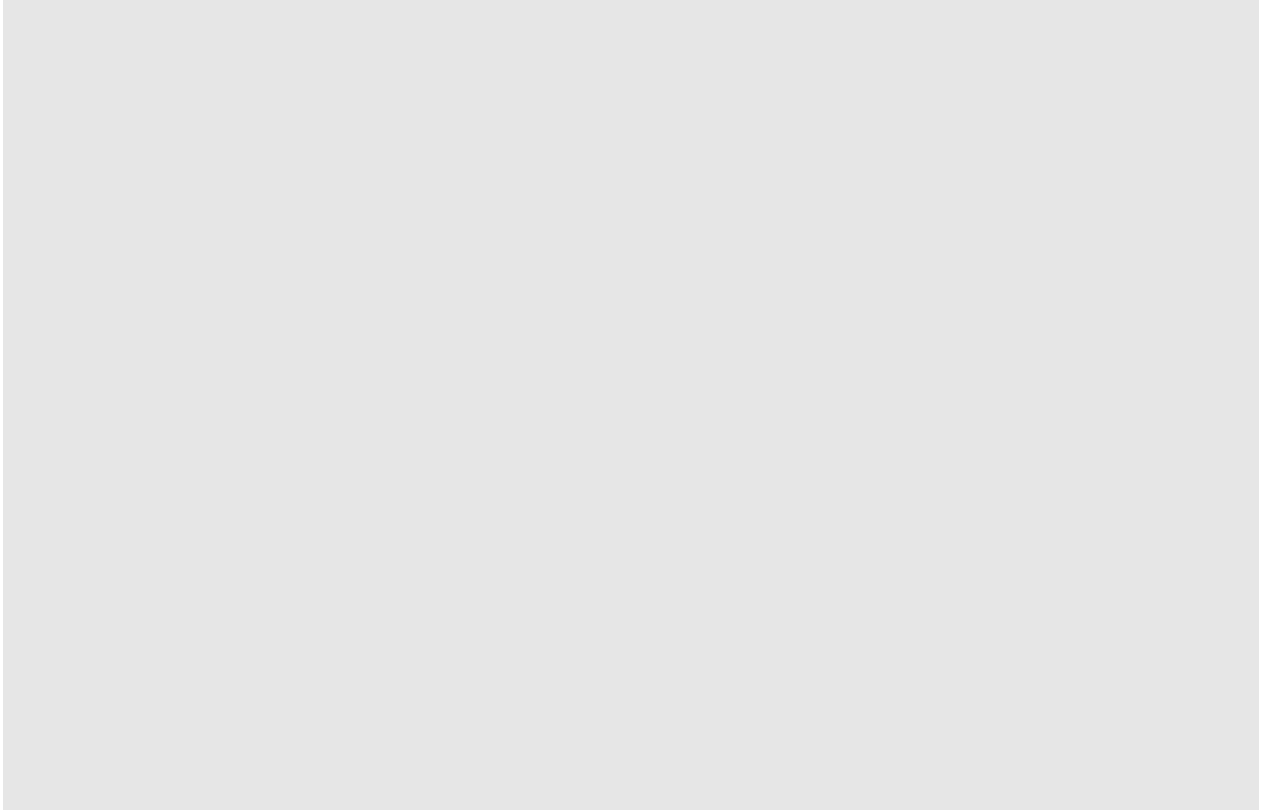
Identify here your main time wasters:



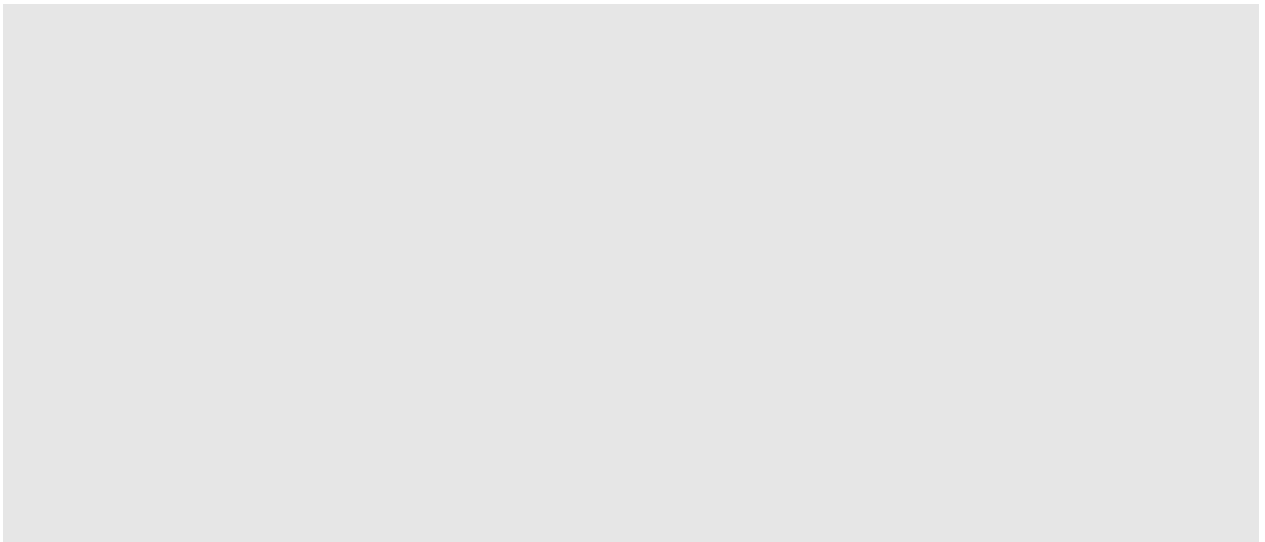
Transcribe in section 5 of your Personal Profile, what you consider to be your top 12 time-wasters from among the ones you identified here.

The individuals I interact most frequently with:

At Work



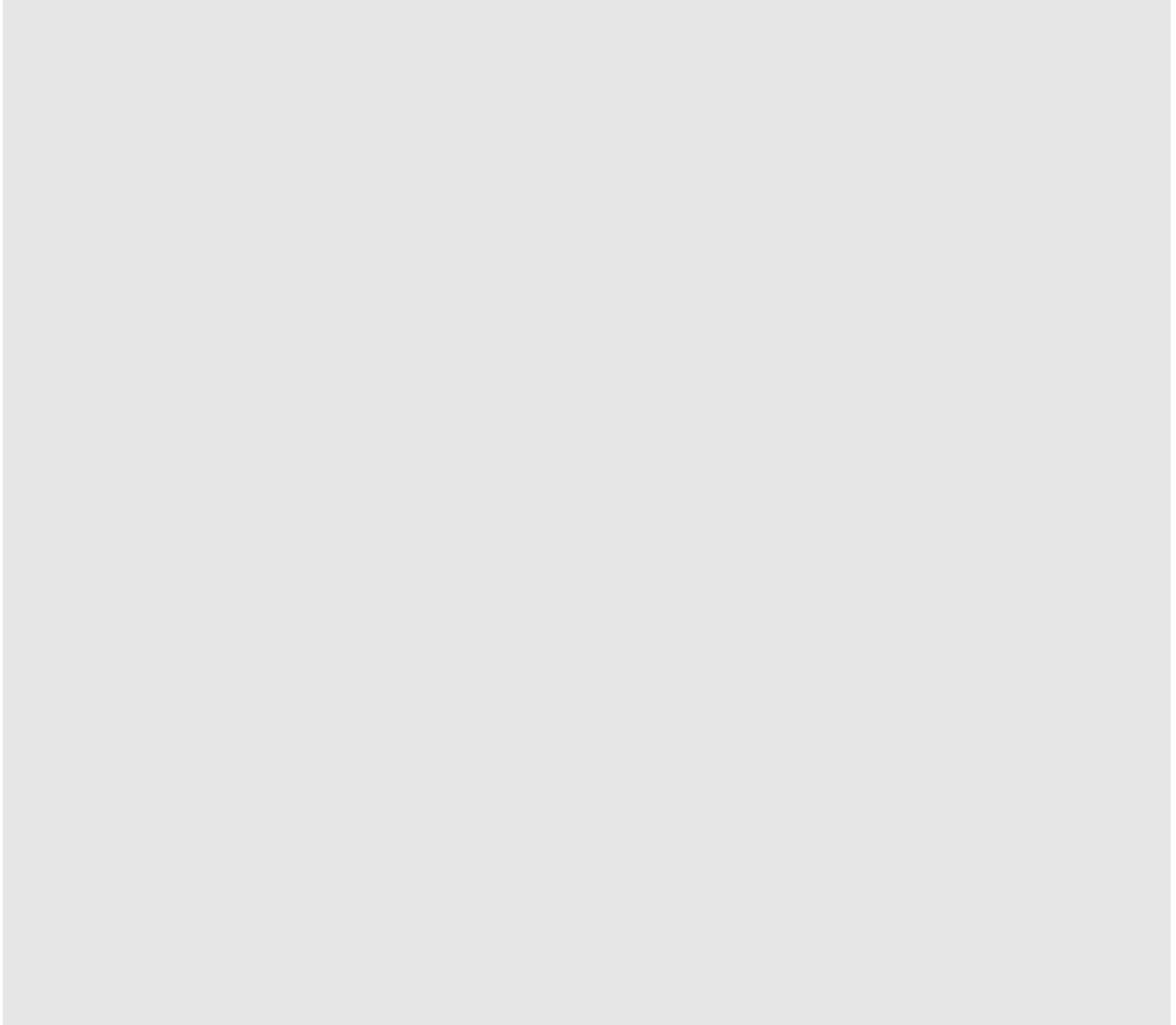
In My Personal Life



Identify in sections 6 and 7 of your Personal Profile up to six individuals from work and up to six individuals in your personal life who tend to waste your time very often or often.

[CLICK HERE](#) to view the audio-visual presentation related to this section of the course.

Notes and Key Points to retain from this section of the course:



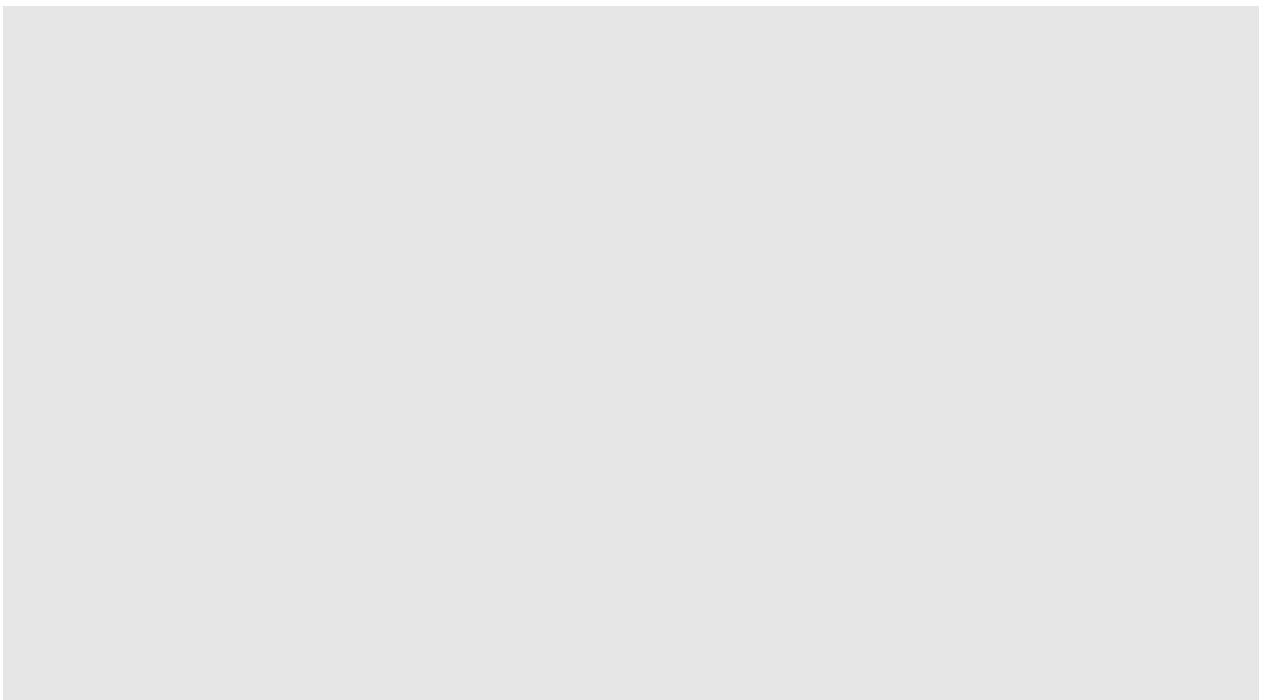
Now specify the tips and ideas you plan to use in section 8 of your Personal Profile.

Exercise D ~ Analyzing Your Work and Personal Activities/Responsibilities

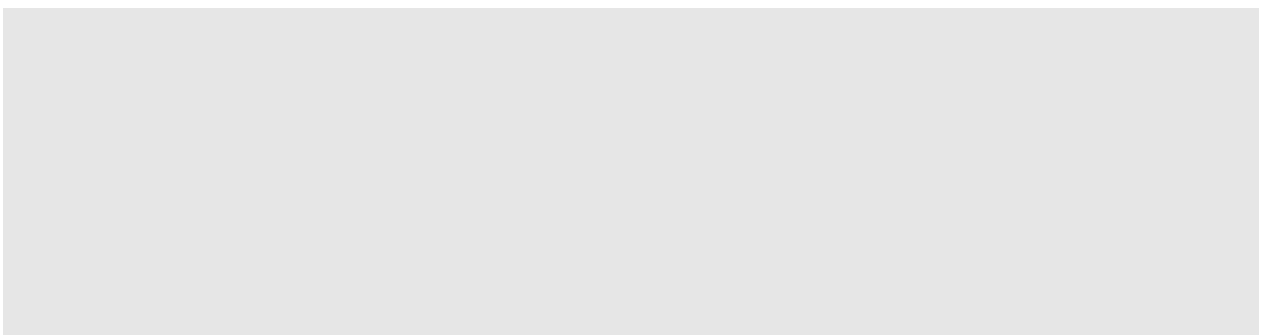
If you want to better manage your time, and become more effective at what you're doing you need to evaluate your habits by answering the questions that you will find on the next page for your main activities/responsibilities - **the ones that you identified earlier and which take up a lot of your time and/or are must do activities.**

Let's focus on 15 of these activities by listing them below:

Work Activities (Minimum 10)



Personal Activities



Now answer the questionnaire on the next pages, for each of these activities.

Analyzing My Key Activities *(For each activity)*

Work Activity: _____

Procedure used to accomplish activity:

Person Responsible

a) In what way does the activity help me reach annual goals and objectives?

b) Is the activity really necessary? In what way is it useful/essential to others my organization?

c) Am I being effective in performing these activities? Are there short-cuts I am not taking advantage of? Can I delegate some of the activities? Is there a better way of getting things done?

Analyzing My Key Activities *(For each activity)*

Personal Activity: _____

Procedure used to accomplish activity:

Person Responsible

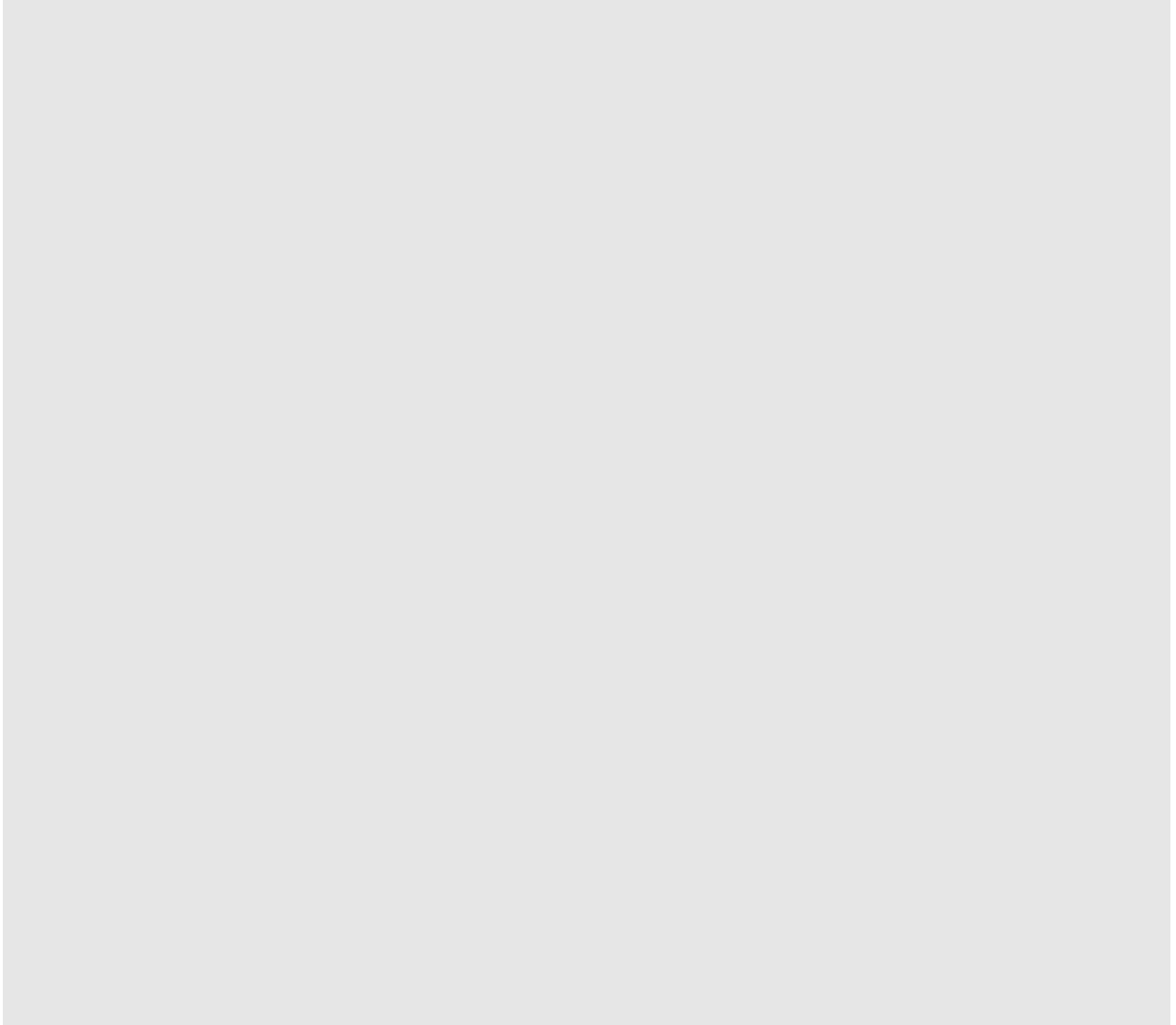
a) In what way does the activity help me reach my personal goals and objectives?

b) Is the activity really necessary? In what way is it useful/essential to me and my family/friends?

c) Am I being effective in performing these activities? Are there short-cuts I am not taking advantage of? Can I delegate some of the activities? Is there a better way of getting things done?

[CLICK HERE](#) to view the audio-visual presentation related to this section of the course.

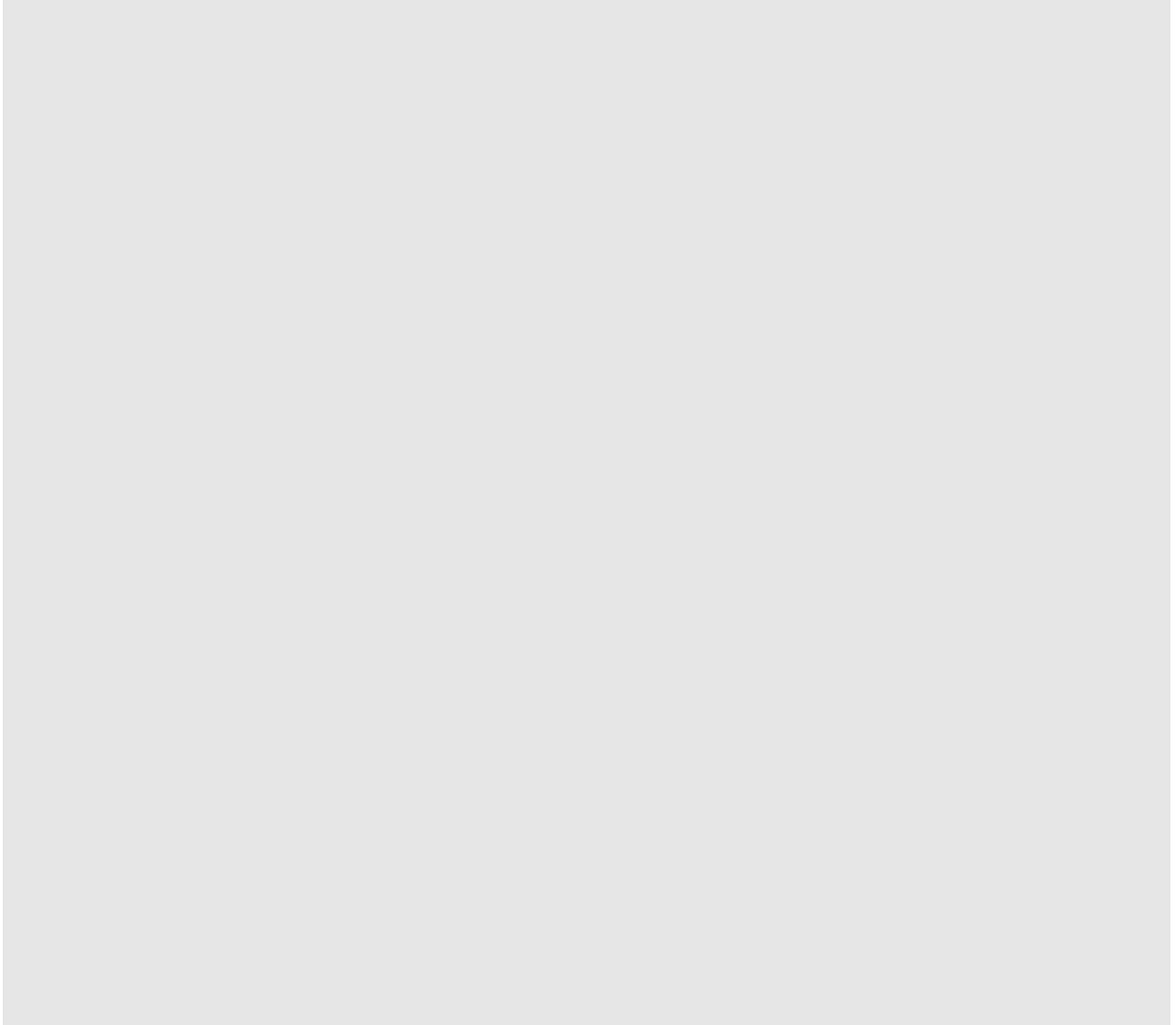
Notes and Key Points to retain from this section of the course:



Now specify the tips and ideas you plan to use in section 9 of your Personal Profile.

[CLICK HERE](#) to view the audio-visual presentation related to this section of the course.

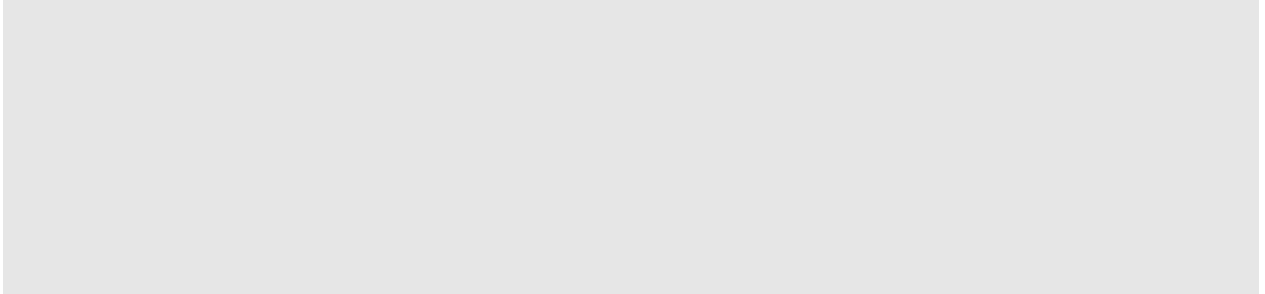
Notes and Key Points to retain from this section of the course:



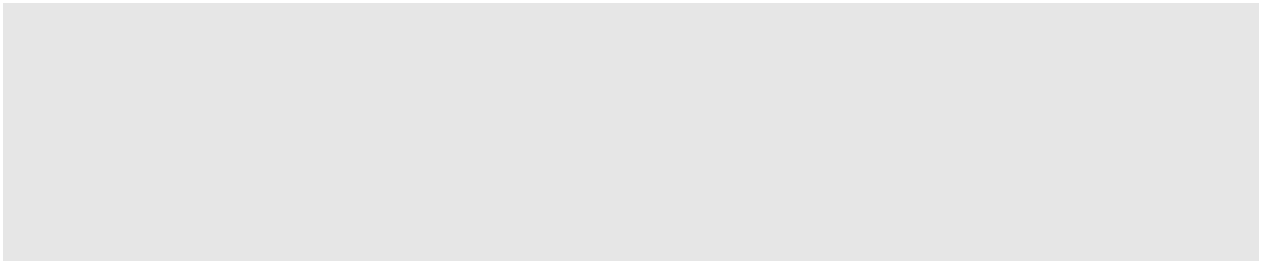
Now specify the tips and ideas you plan to use in section 10 of your Personal Profile.

Personal Profile for Managing My Time

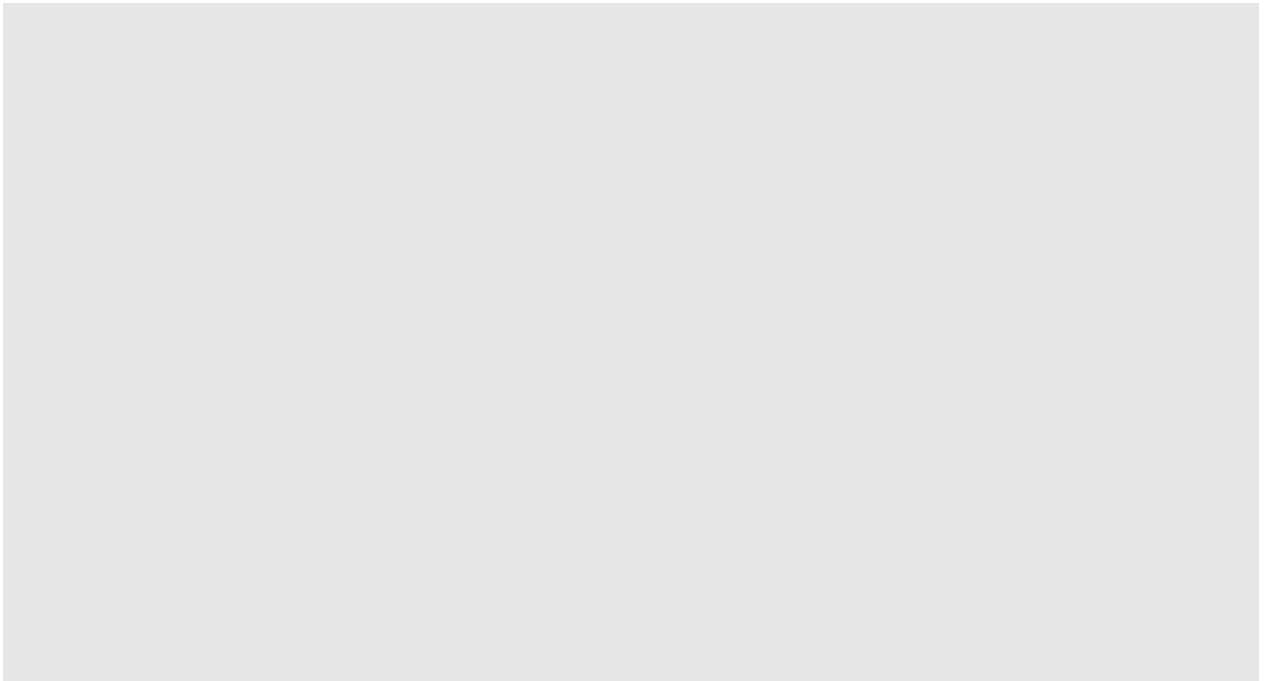
1. The skills for managing my time that I excel at



2. Skills for managing my time that need improving



3. My 12 most time-consuming work responsibilities:



4. My 6 most time-consuming personal activities:

5. My 12 most common time-wasters:

6. Six individuals who waste my time the most at work:

7. Six individuals who waste my time the most in my personal life:

8. Tips and ideas I intend to use to improve my overall self-organization.

Target Date

Agenda

Office

Desk

Filing System

**E-Mail &
Correspondence**

**9. Tips and ideas I intend to use to improve my interactions
with others**

Target Date

Delegation

On the telephone

Meetings

Cooperation

10. Tips and techniques I intend to use to minimize time wastage

Target Date

**Interruptions
and time wastage**

Procrastination

Concentration

11. Six individuals **at work** who waste my time the most and ways to minimize this time wastage:

Individual	Ways to reduce time wastage
Individual	Ways to reduce time wastage
Individual	Ways to reduce time wastage
Individual	Ways to reduce time wastage
Individual	Ways to reduce time wastage
Individual	Ways to reduce time wastage

12. Six individuals in **my personal life** who waste my time the most and ways to minimize this time wastage:

Individual

Ways to reduce time wastage

Individual

Ways to reduce time wastage

Individual

Ways to reduce time wastage

Individual

Ways to reduce time wastage

Individual

Ways to reduce time wastage

Individual

Ways to reduce time wastage

Conclusion

We have now covered the key points within the program. It's also time for you to begin implementing some of the goals you have set for yourself while completing the program and to begin to use some of the ideas, tips and techniques which you find especially helpful.

Be sure to frequently review your Personal Profile, and the goals you have set for yourself . Also be sure to take the necessary actions over a reasonable period of time, to realize as many of these goals as possible.

Remember, however, to not try to do everything at the same time. You may otherwise, feel too overwhelmed, to continue implementing your time management decisions. So be sure to implement your time management plan over an extended period of time, so that you feel comfortable with the pace of your progress.

We take this opportunity to wish you a lot of success in your efforts to manage your time and use technology more effectively.

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The Stepping-Up Approach To Business Success

EXPERIENCING THE WINNING EDGE

MODULE SIX

Identifying Your Best Target Markets

A Gift from G.O.L.E.A.D.

Montreal, Quebec, Canada



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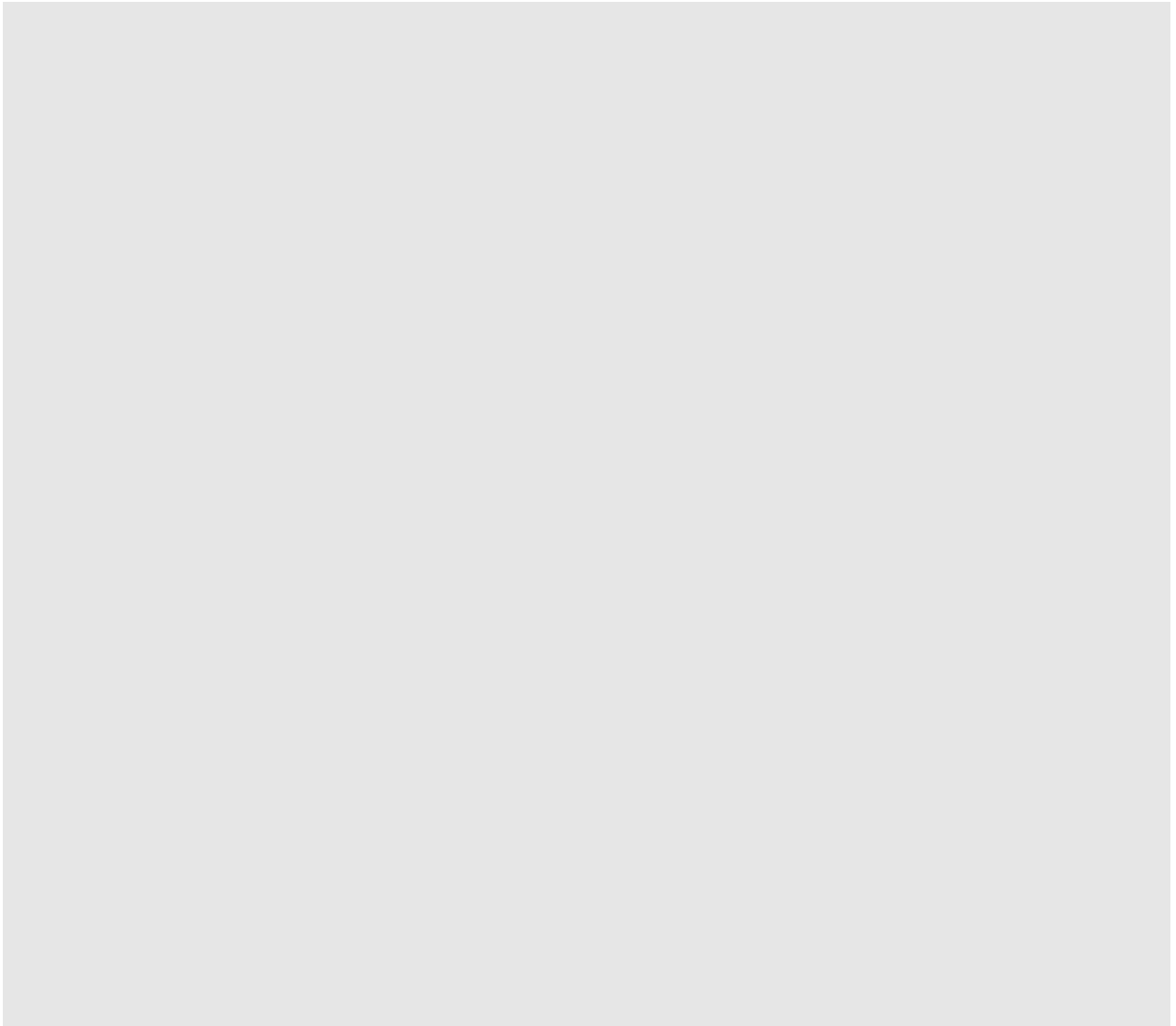
Objectives of Module Six:

As a result of completing this Module, you should be prepared to answer the following questions:

1. What is the definition of best target market?
2. What are the main elements to consider if you are marketing your products or services to other businesses?
3. What are the main elements to consider if you are marketing to individuals and families?
4. What are the types of prospective clients that you can encounter?
5. What is your prospecting plan?
6. What are the tools that you have developed in order to implement your plan?

[CLICK HERE](#) to view the audio-visual presentation related to this section of the course.

Notes and Key Points to retain from this section of the course:



Exercise 1 - Profile of Your Clients or Prospective Clients Who Are Generating or Will Likely Generate Most of Your Income

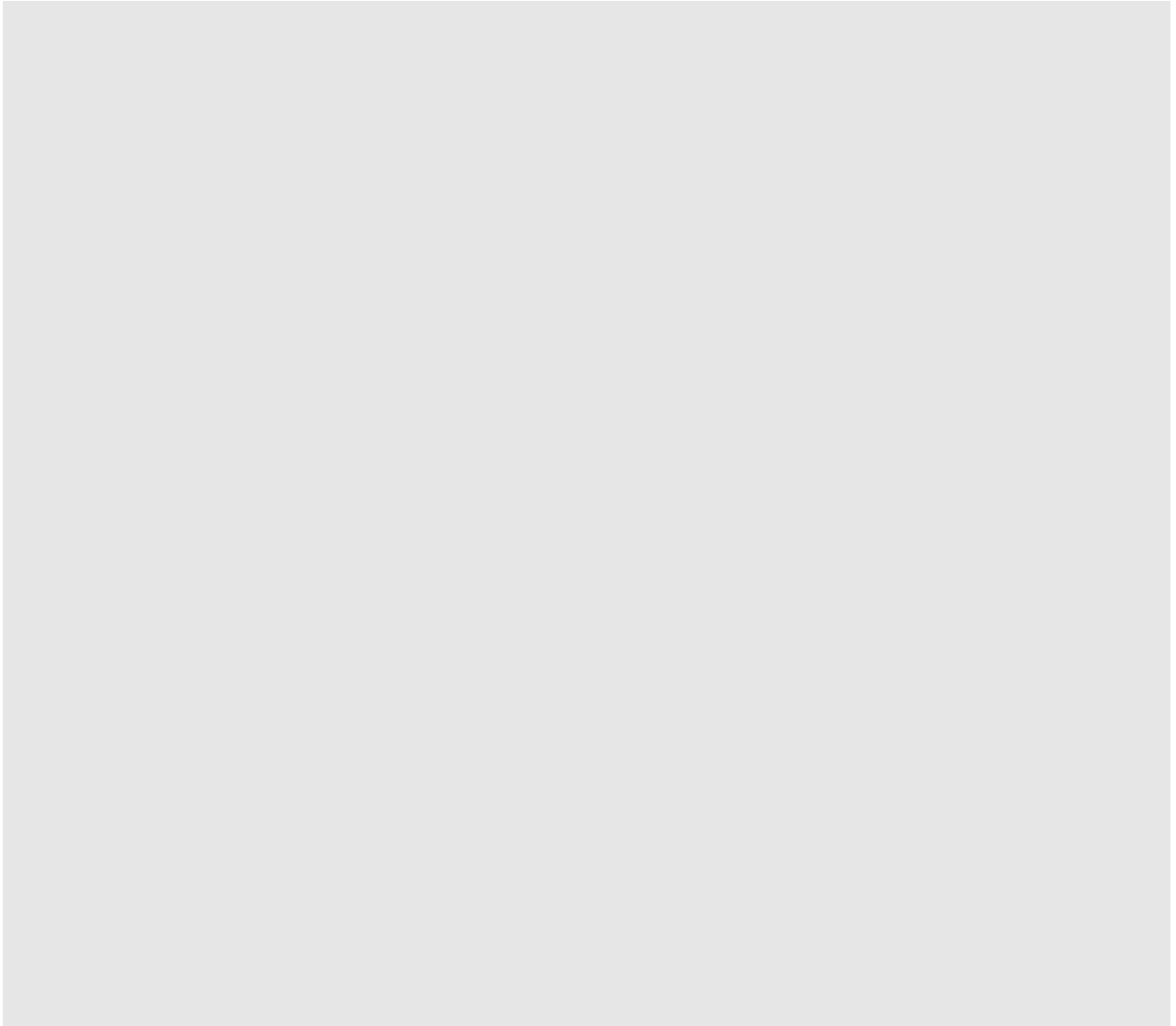
Target Market One:

Target Market Two:

Target Market Three:

[CLICK HERE](#) to view the audio-visual presentation related to this section of the course.

Notes and Key Points to retain from this section of the course:



Exercise 2 – Your Ratios

Prospecting Calls to Secure a Meeting: (For different services/products)

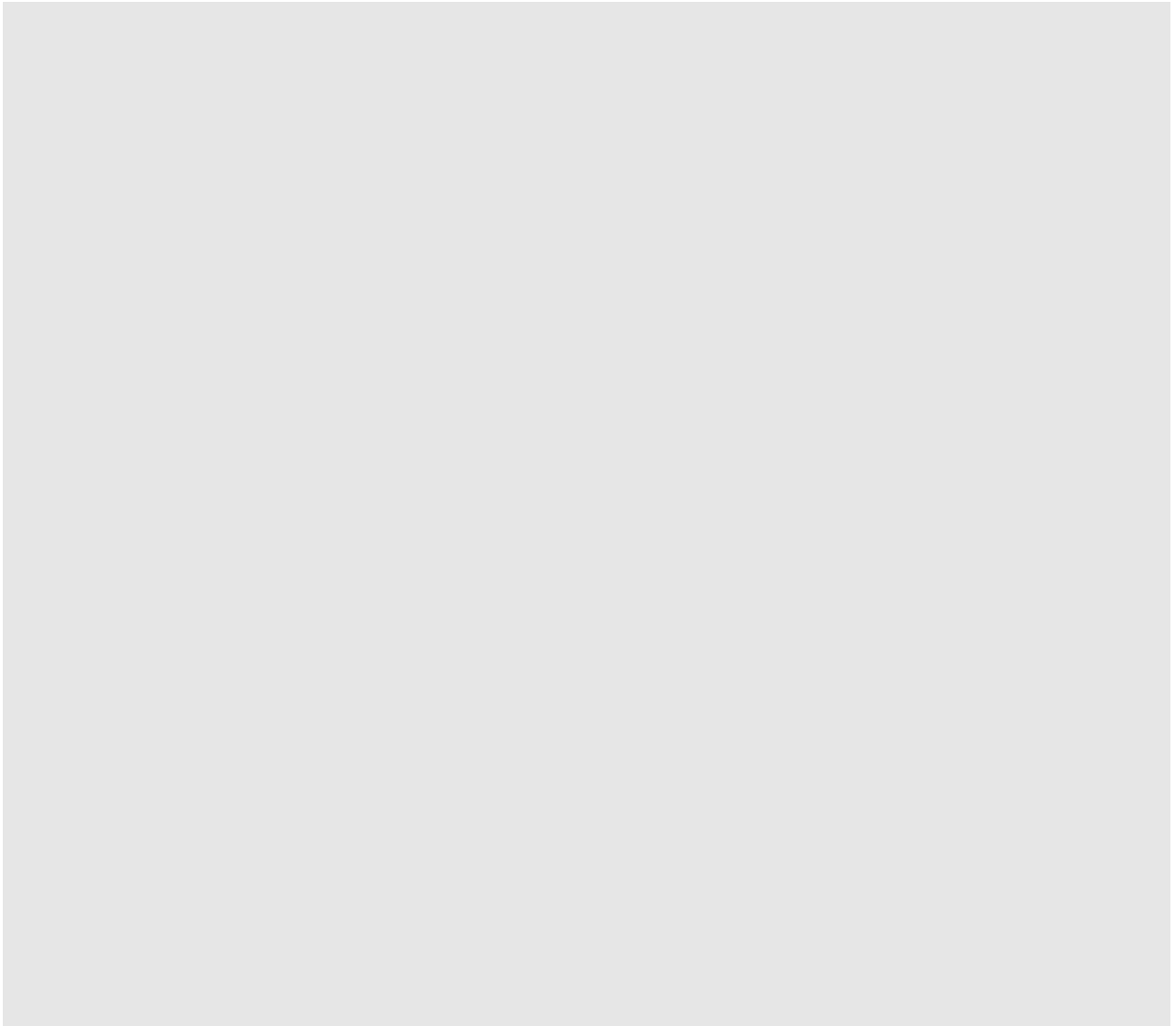
Meetings to Secure Sale: (For different services/products)

Average Amount of Sale: (For different services/products)

Other Ratios That Could Be of Interest: (For different services/products)

[CLICK HERE](#) to view the audio-visual presentation related to this section of the course.

Notes and Key Points to retain from this section of the course:



Exercise 3 – Working Up Some Numbers

Gross Annual Income:

Number of Clients:

Average Income per Client:

Number of Best Clients:

Average Income from Best Clients:

Income Objective for Next 12 Months:

Number of New Best Clients Needed:

Profile of Best Clients

Exercise 4

Products or Service - Complete one page for each product or service that you offer

Main Features of That Product or Service:

Main Benefits of That Product or Service:

Profile of Your Ideal Client Who Would Benefit Most From That Product or Service:

In What Way Will My Product or Service:

- 1) Save money for these prospective clients?
- 2) Increase the revenue of these prospective clients?
- 3) Make these prospective clients feel good?
- 4) Make the prospective clients feel or look good in front of others?

Is it Necessary To Make Changes In Order To Be More Competitive? If Yes, What Changes?

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- 1) Save money for these prospective clients?
- 2) Increase the revenue of these prospective clients?
- 3) Make these prospective clients feel good?
- 4) Make the prospective clients feel or look good in front of others?

Is it Necessary To Make Changes In Order To Be More Competitive? If Yes, What Changes?

Products or Service - Complete one page for each product or service that you offer

Main Features of That Product or Service:

Main Benefits of That Product or Service:

Profile of Your Ideal Client Who Would Benefit Most From That Product or Service:

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The Stepping-Up Approach To Business Success

EXPERIENCING THE WINNING EDGE *MODULE SEVEN* **BUILDING RELATIONSHIPS**

A Gift from G.O.L.E.A.D.

Montreal, Quebec, Canada



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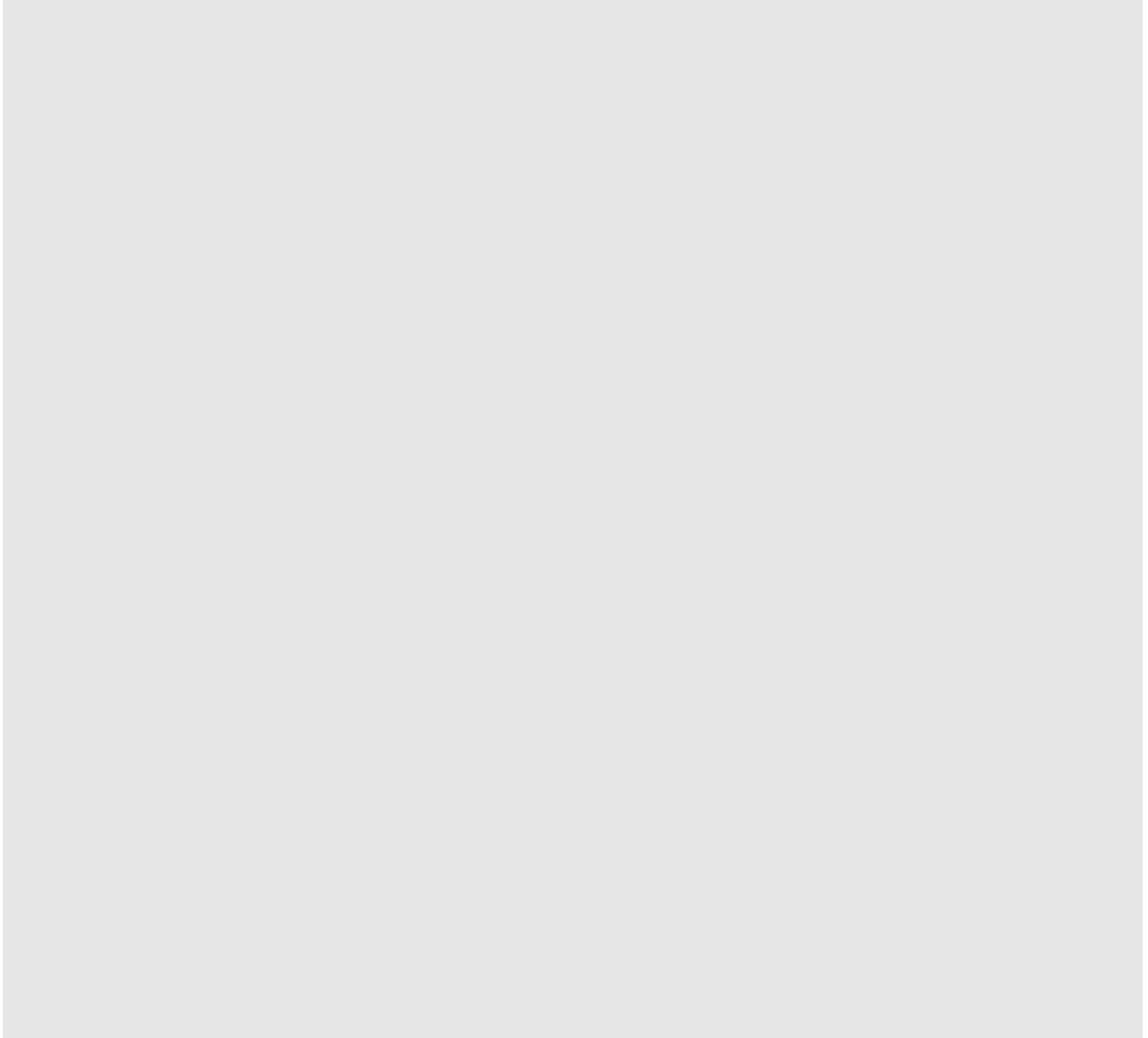
Objectives of Module Seven:

As a result of completing this Module, you should be prepared to answer the following questions:

1. What are win-win relationships?
2. What are the benefits of having win-win relationships?
3. What are the consequences of having win-win relationships?
4. What are the elements for developing respect?
5. How can we create a good first impression?
6. How do we develop trust?
7. Describe the main characteristics of Comfort styles?
8. Describe the main characteristics of Pleasing styles?
9. Describe the main characteristics of Control styles?
10. Describe the main characteristics of Significance styles?

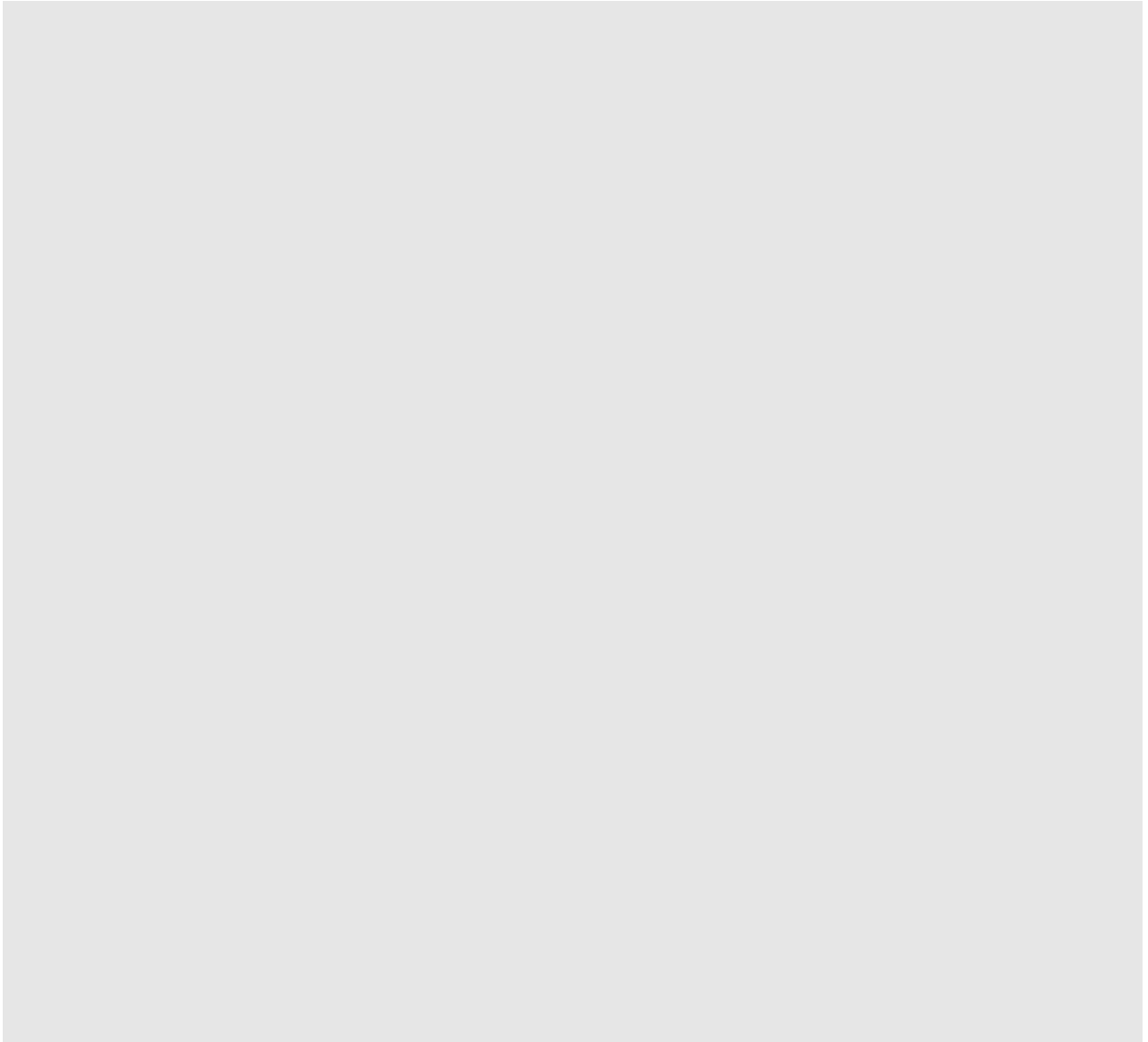
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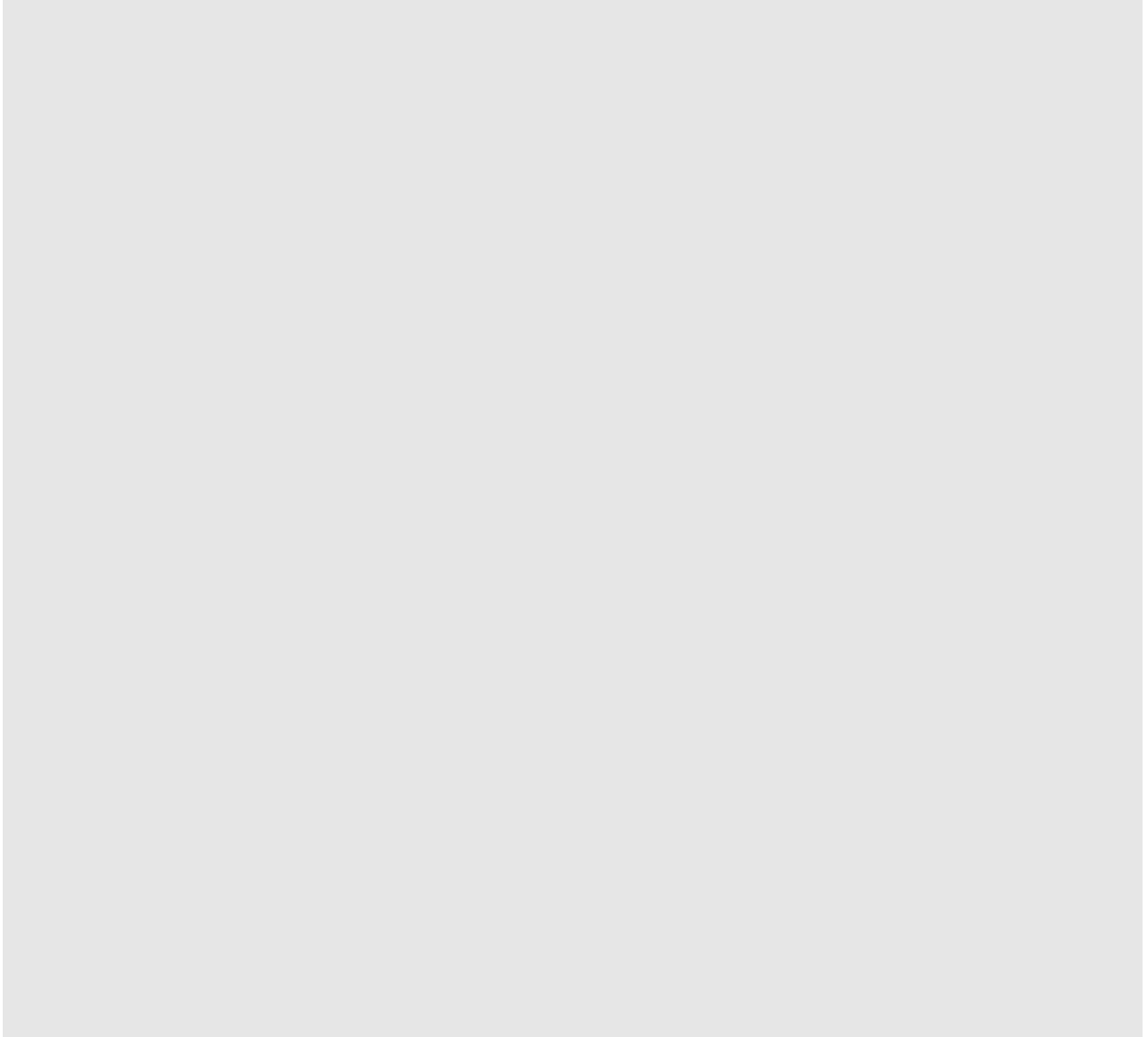
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Exercise A ~ Identifying Your Own Personal Style

Identifying Your Personal Styles

So, do you see yourself described in one or more of these styles? Probably. But how can you be sure which styles are predominant for you?

One of the best ways to determine your predominant style is to remember your behavior **under stressful situations**. You should think of the way you approach and resolve situations. The fact is that when you are acting under stressful and challenging conditions your more basic values surface. When you are under stress, you let go of all your role-plays.

Under stressful, panic situations:

Are you concerned with finding quick solutions to avoid the immediate stress? This is the typical reaction of the Comfort style.

Are you particularly concerned with how everyone else would feel about the situation and how it would affect them? Is Pleasing therefore one of your predominant styles?

Are you concerned with developing a quick and effective plan of action and in getting the task done as soon as possible? Were you impatient? Is Control one of your predominant styles? OR

Are you concerned with analyzing problems in detail and arriving at the best possible solution to the problem? Are you Significance-oriented?

**Take the time now to rate yourself in relation to these 4 styles.
Use a scale of 1 to 10 to rate yourself with 10 being high.**

Comfort		Pleasing		Control		Significance	
---------	----------------------	----------	----------------------	---------	----------------------	--------------	----------------------

Exercise B ~ Work and Personal Relationships

This exercise is concerned with the 5 most significant work relationships, and the 5 most significant personal relationships that you currently have, including at least two that are difficult relationships at work and at home. Work relationships could include co-workers, your subordinates or your manager, suppliers, customers, and perhaps staff from other departments or divisions. At home, they could include your spouse, your children, your parents, a friend, a neighbor, or an acquaintance. Write the names of the five people on the top of each column and then use the following rating system to determine their top one or two predominant personal styles. Remember how they behave under panic or stress.

Rating: Probable 1

Possible: 2

Unlikely: 3

Work Relationships

Name

--	--	--	--	--

Comfort

Pleasing

Control

Significant

Personal Relationships

Name

--	--	--	--	--

Comfort

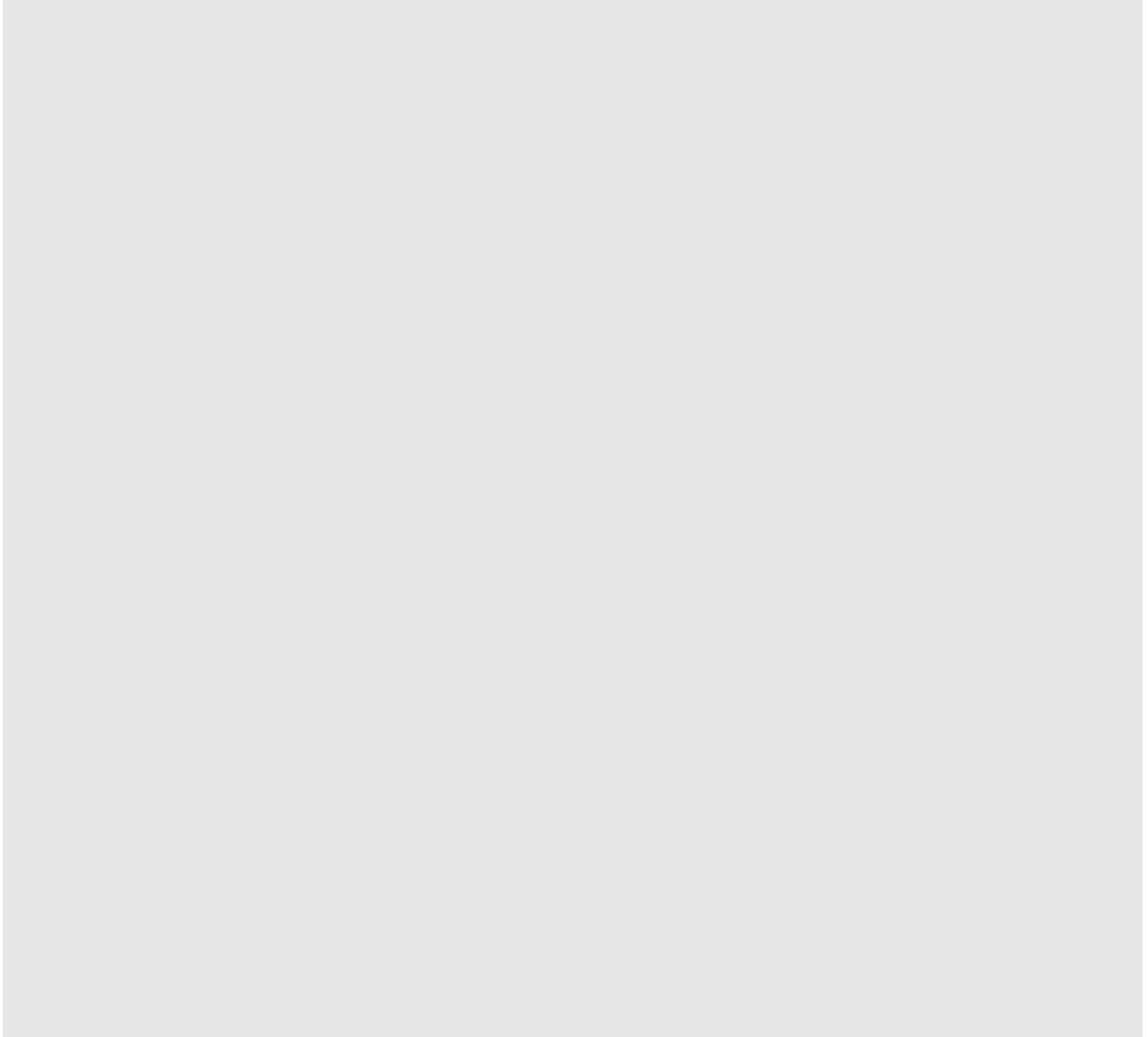
Pleasing

Control

Significant

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Notes and Key Points to retain from this section of the course:



Exercise C ~ Work Relationships

This exercise is concerned with identifying the key strengths of the 5 most significant work relationships you identified in Exercise B of your workbook. Write their names in the space below and identify for each of them up to 6 strengths you feel describe them most of the time or often.

Strengths:

Enthusiastic	Thoughtful	Trusting
Open-minded	Good sense of humor	Patient
Optimistic	Hard-working	Efficient
Perceptive	Organized	Responsible
Cautious	Confident	Supportive
Communicative	Understanding	Dependable
Sharp	Cooperative	Friendly
Thorough	Self-starter	Decisive
Relaxed	Determined	

Work Relationships

Name

Their Six Key Strengths

(Ones you feel describe them most of the time or often)

Work Relationships

Name

Sincere Compliments To Remember To Make

Exercise C ~ Personal Relationships

This exercise is concerned with identifying the key strengths of the 5 most significant personal relationships you identified in Exercise B of your workbook. Write their names in the space below and identify for each of them up to 6 strengths you feel describe them most of the time or often.

Strengths:

Enthusiastic	Thoughtful	Trusting
Open-minded	Good sense of humor	Patient
Optimistic	Hard-working	Efficient
Perceptive	Organized	Responsible
Cautious	Confident	Supportive
Communicative	Understanding	Dependable
Sharp	Cooperative	Friendly
Thorough	Self-starter	Decisive
Relaxed	Determined	

Personal Relationships

Name

Their Six Key Strengths

(Ones you feel describe them most of the time or often)

Personal Relationships

Name	Sincere Compliments To Remember To Make

Exercise D ~ Motivators

Work Relationships

This exercise involves identifying the motivators of the five work relationships you listed earlier in your workbook. Write the name of each person in the appropriate space below and indicate for each of them what you feel are their four key motivators.

MOTIVATORS

Achievement-Oriented

Learning

Analyzing problems and finding solutions

Taking calculated risks

Being creative

Affiliation-Oriented

Receiving recognition

Socializing/working with others

Expressing him/herself

Being listened to

Power-Oriented

Leading others

Organizing

Making decisions

Competing/winning

Work Relationships

Name

Their Four Key Motivators (*Most of the time or often*)

Personal Relationships

This exercise involves identifying the motivators of the five personal relationships you listed earlier in your workbook. Write the name of each person in the appropriate space below and indicate for each of them what you feel are their four key motivators.

MOTIVATORS

Achievement-Oriented

Learning

Analyzing problems and finding solutions

Taking calculated risks

Being creative

Affiliation-Oriented

Receiving recognition

Socializing/working with others

Expressing him/herself

Being listened to

Power-Oriented

Leading others

Organizing

Making decisions

Competing/winning

Personal Relationships

Name

Their Four Key Motivators *(Most of the time or often)*

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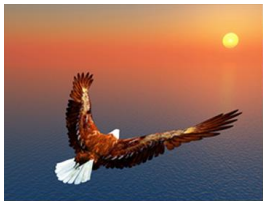
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The Stepping-Up Approach To Business Success

EXPERIENCING THE WINNING EDGE *MODULE EIGHT* **PROSPECTING INTELLIGENTLY**

A Gift from G.O.L.E.A.D.

Montreal, Quebec, Canada



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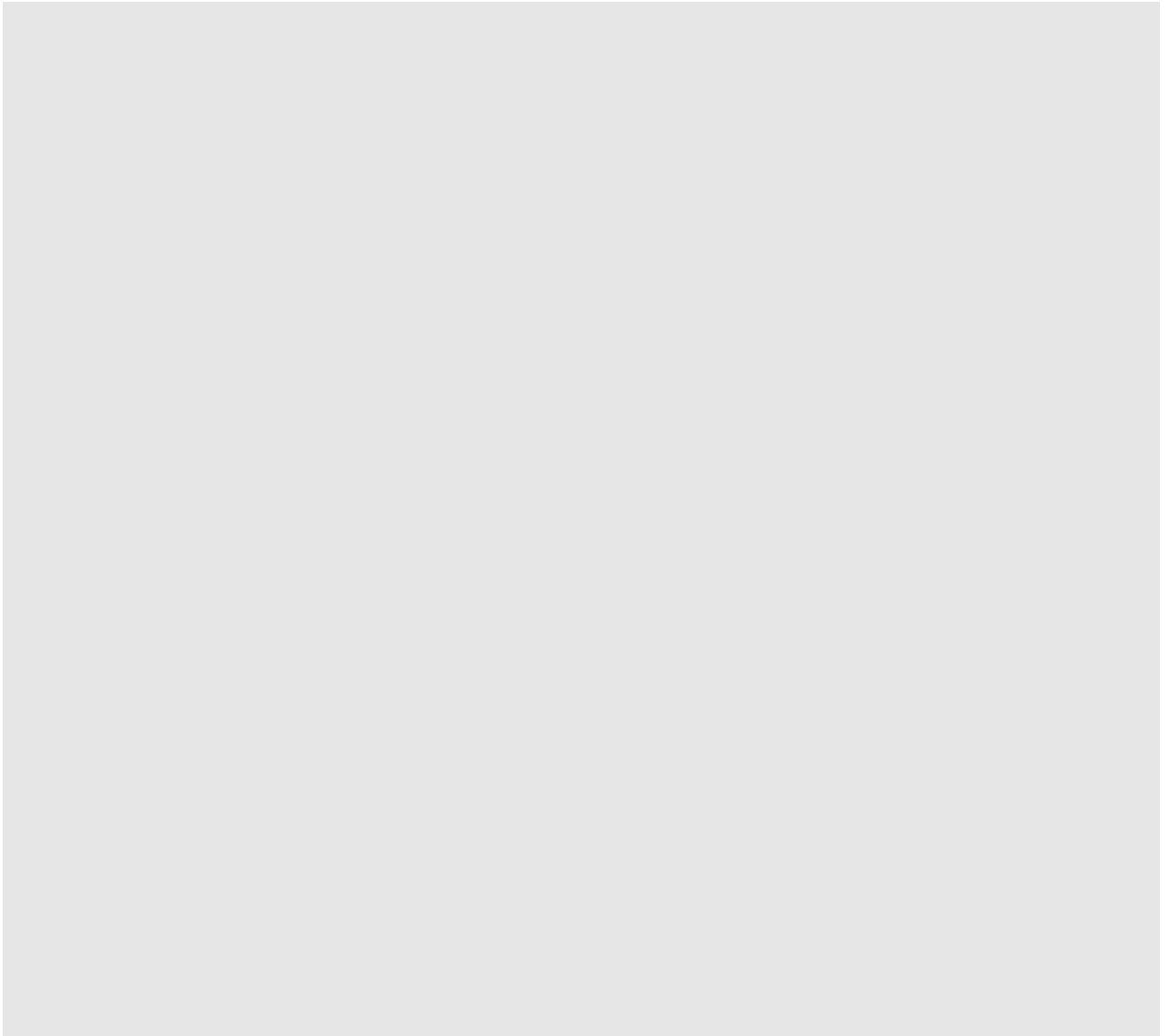
Objectives of Module Eight

As a result of completing this Module, you should be prepared to answer the following questions:

1. What is prospecting?
2. What is prospecting the least liked selling function?
3. What can you do to mentally prepare yourself before being to make prospecting calls?
4. What can you do to plan an effective prospecting campaign?
5. What are some techniques you can use to deal effectively with voice mail?
6. What are some useful tips and techniques which you plan to use when making telephone calls?
7. What kind of things can you do to stay better organized?

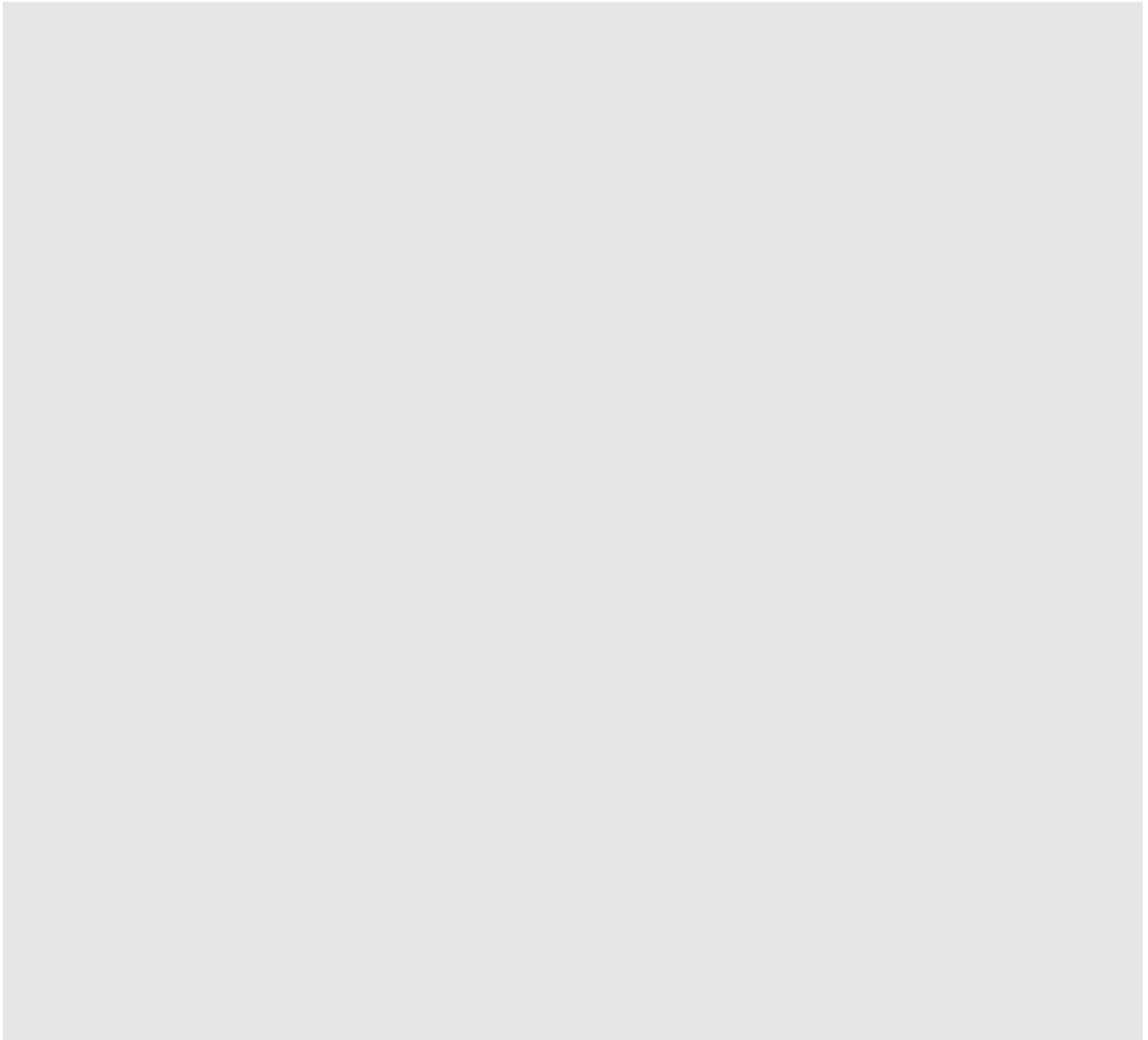
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Exercise A – Your Prospecting Goals and Plan of Action

1. Setting Your Prospecting Goals

a) Annual Business You Currently Receive From:

Networking, Strategic Alliances, Referrals	\$	
Website/Other Promotional Campaigns	\$	
Prospecting Activities	\$	

b) Amount Of Time You Currently Spend On: (Annual)

Networking, Strategic Alliances, Referrals:	Hours	
Website and Other Promotional Campaigns	Hours	
Prospecting Activities		

c) Your Current Ratios

1. Average Dollar Amount Per Sale From

Networking, Strategic Alliances, Referrals	\$	
Website and Promotional Campaigns	\$	
Prospecting Activities	\$	

2. Average Number Of:

Prospecting Calls To Secure One Meeting	
Meetings To Secure A Sale	

Your Prospecting Goals For Next Year:

2. Your Prospecting Lists

Specific Target You Want To Reach

a)

The Criteria For Your Prospecting List

Specific Target You Want To Reach

b)

The Criteria For Your Prospecting List

Specific Target You Want To Reach

c)

The Criteria For Your Prospecting List

Source(s) For the List(s)

Budget

3. Your Prospecting Script

How you will introduce yourself

Your statement of why you are calling

How you will ask for a subsequent in person or telephone meeting

Objection You Can Expect:

Your Response

Objection You Can Expect:

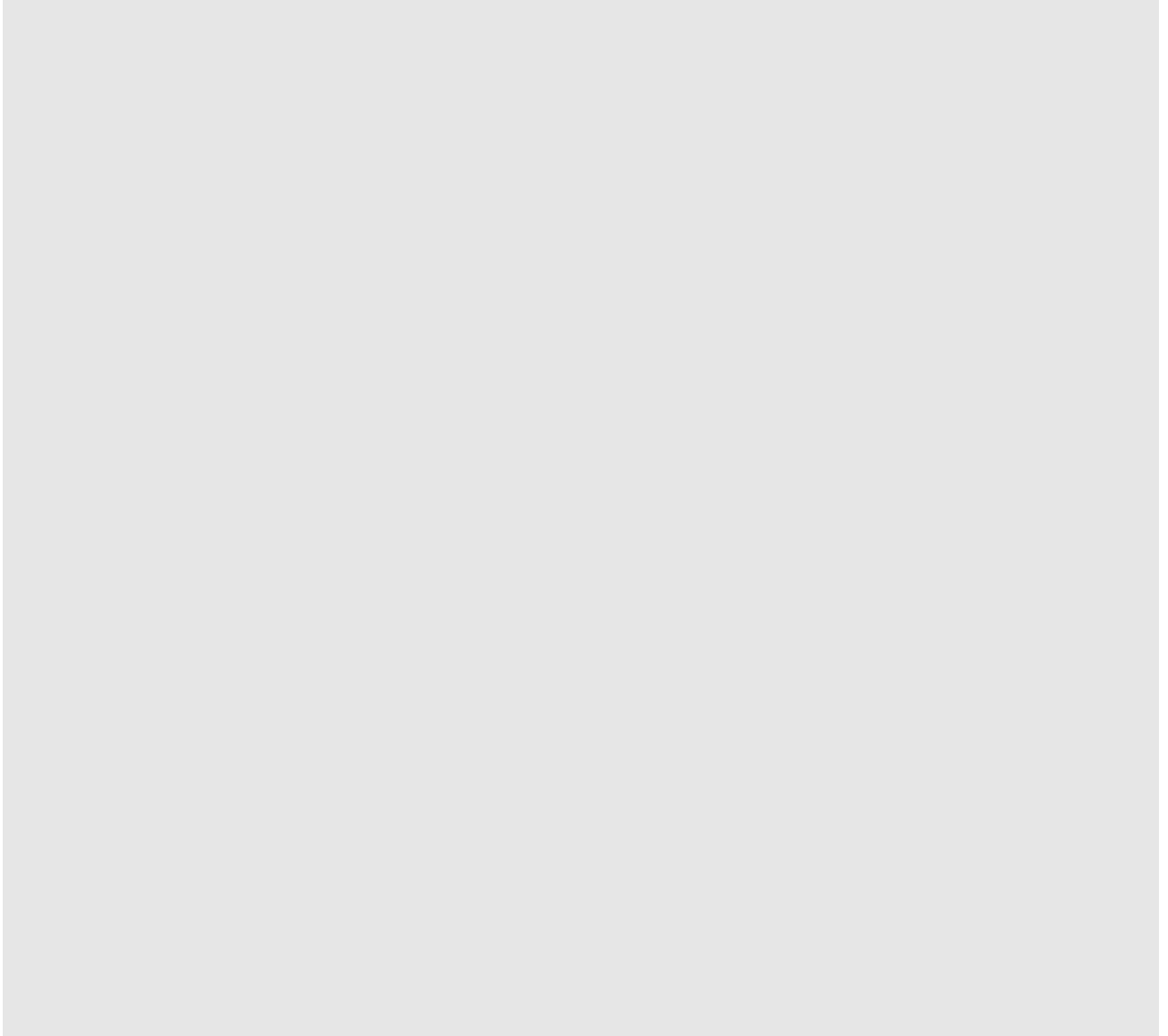
Your Response

Objection You Can Expect:

Your Response

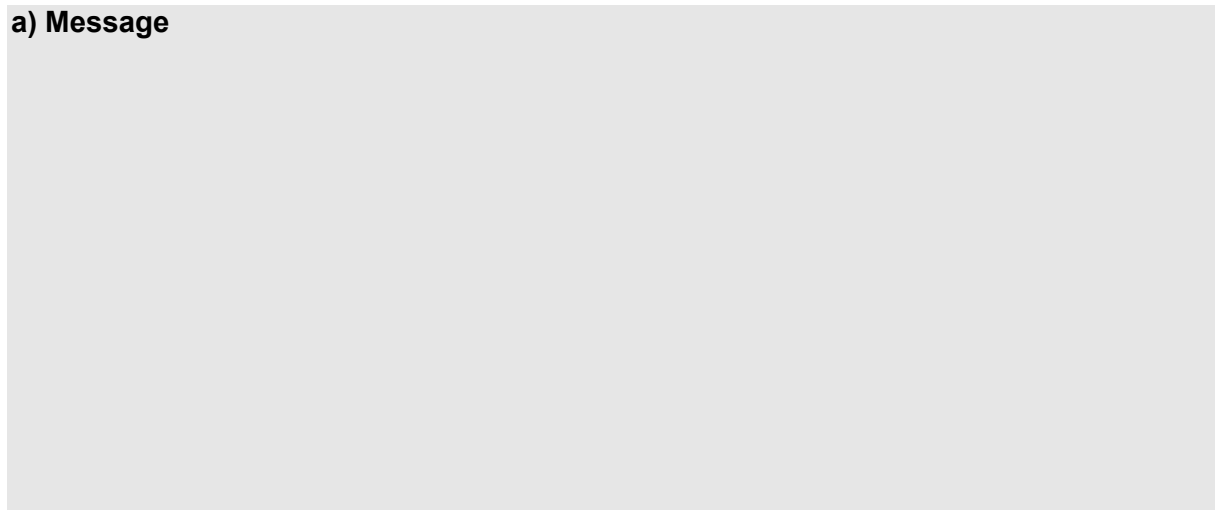
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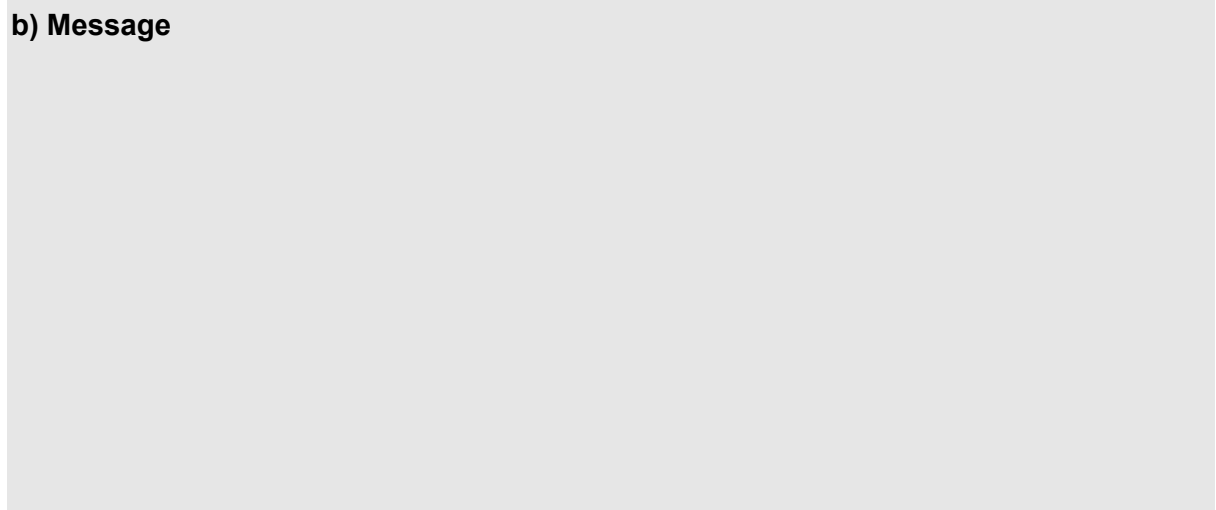


4. Your Voice Mail Message (s)

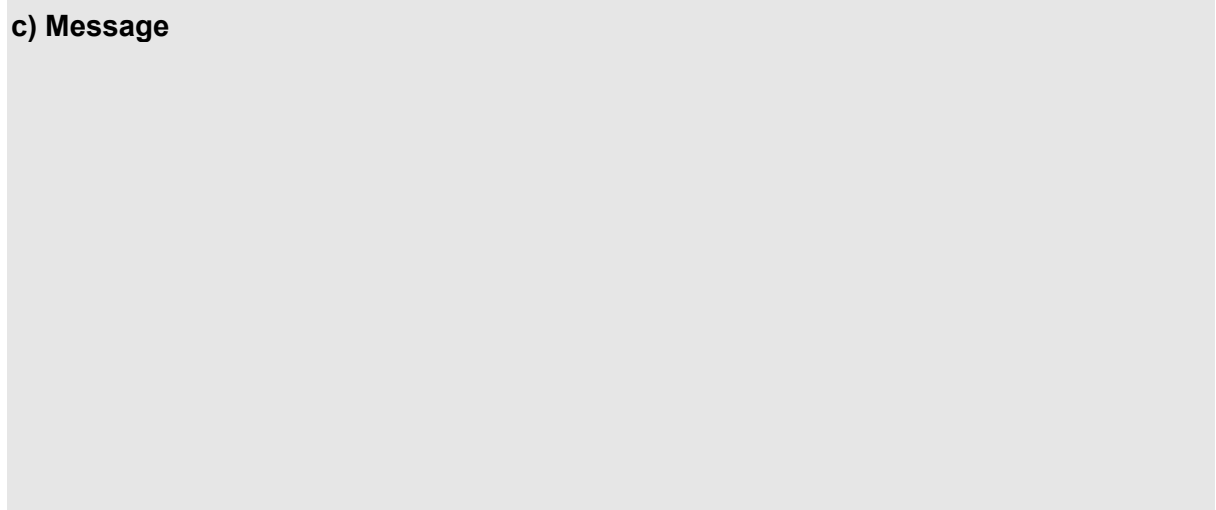
a) Message



b) Message

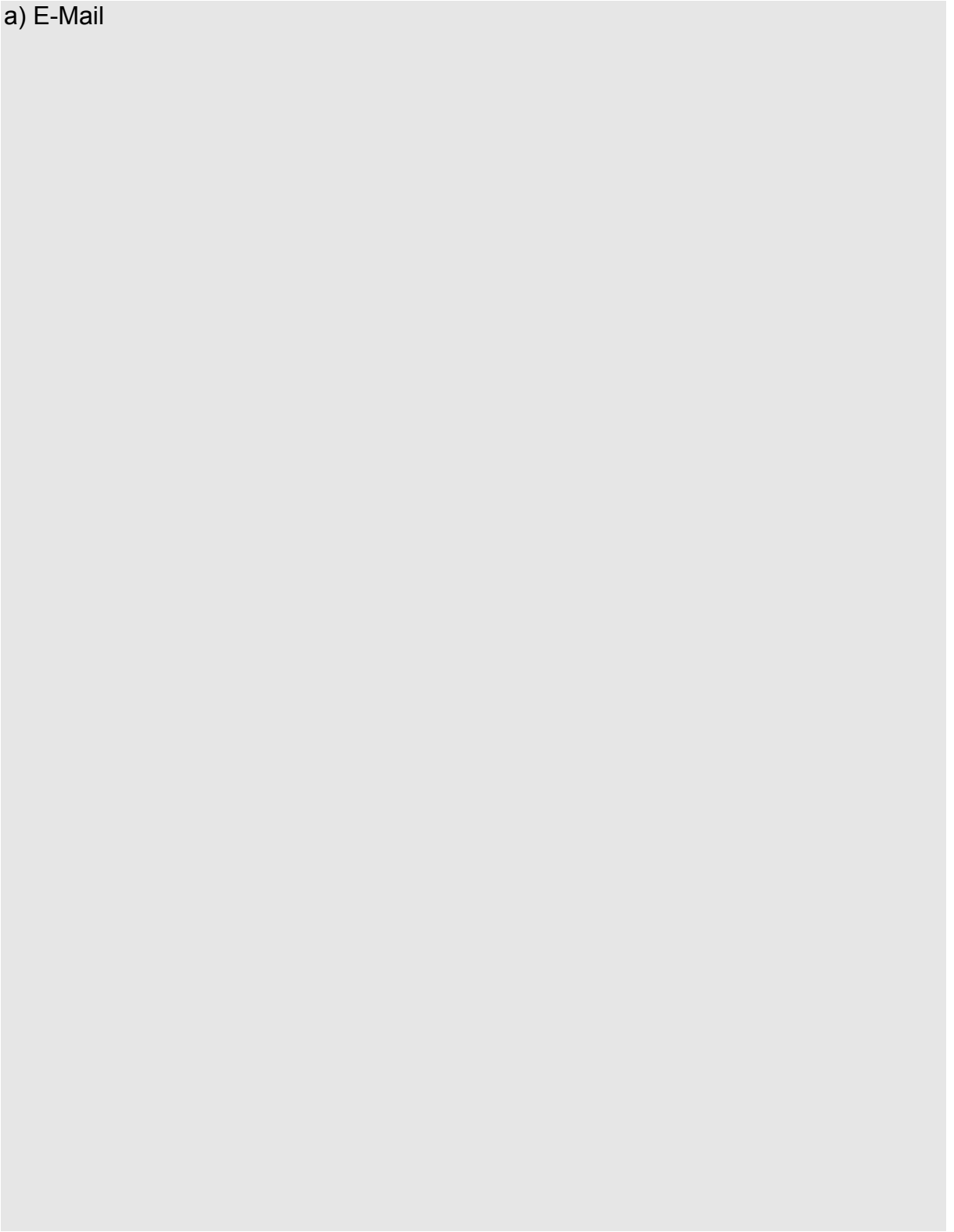


c) Message

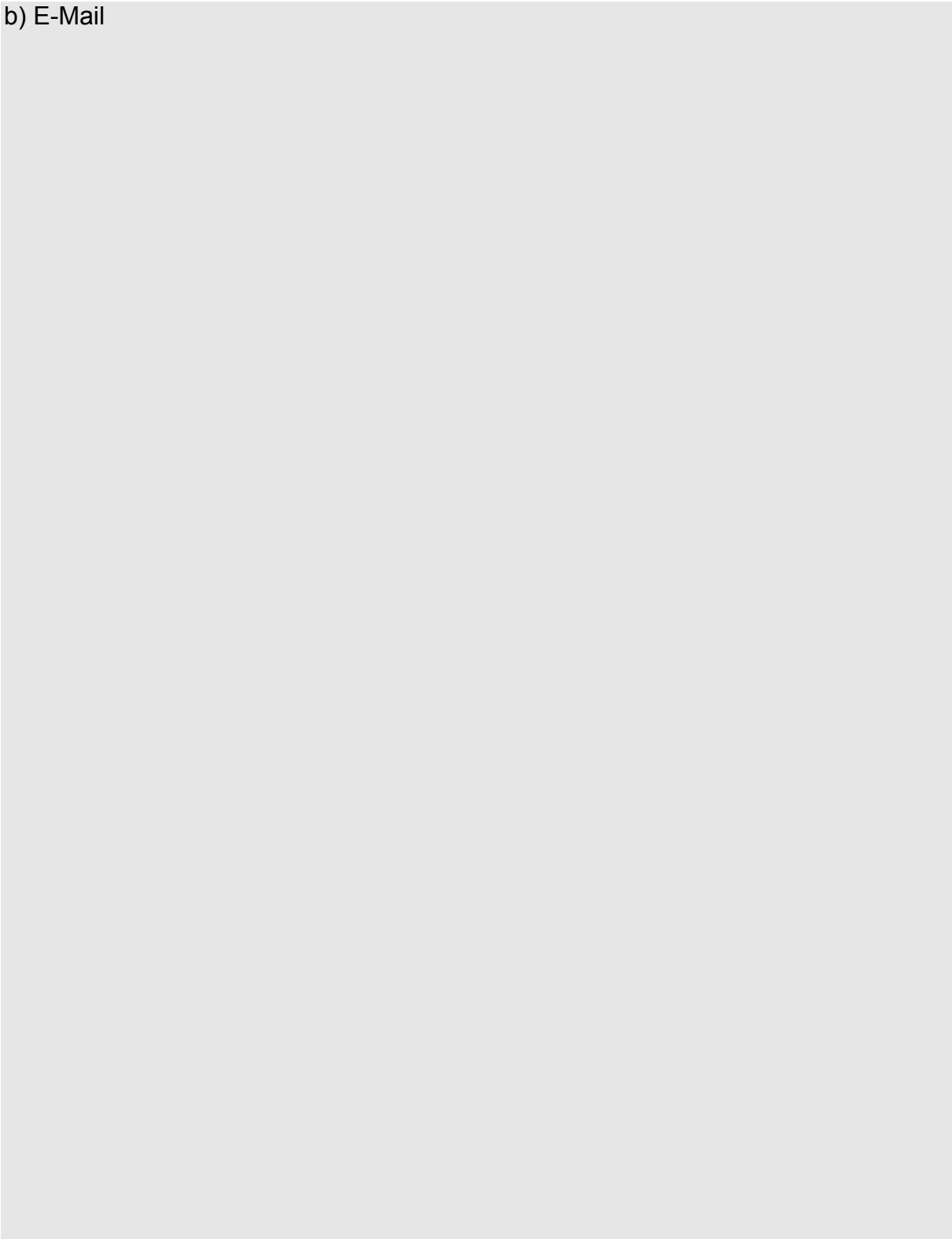


5. Your E-Mail Campaign

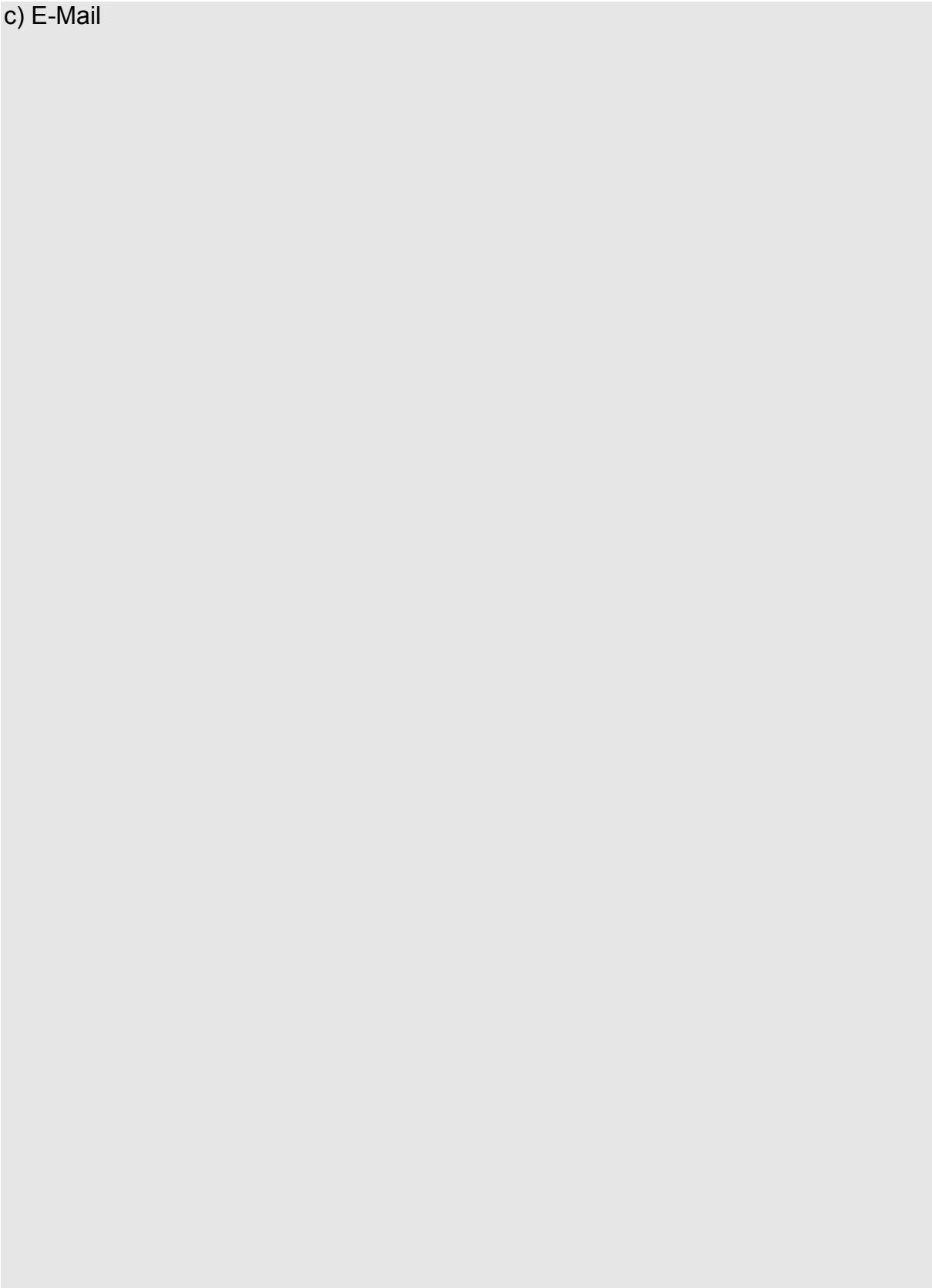
a) E-Mail



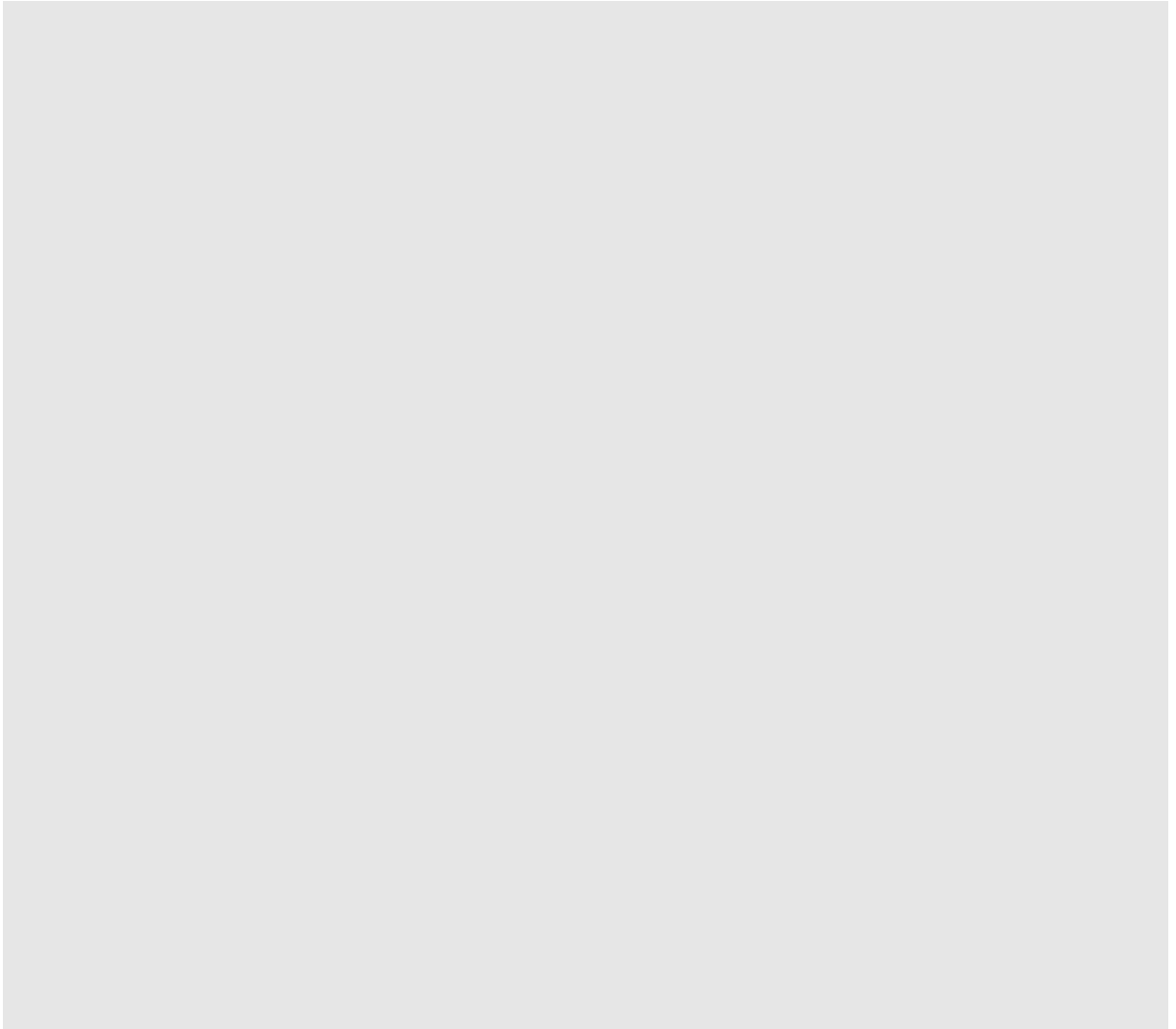
b) E-Mail



c) E-Mail



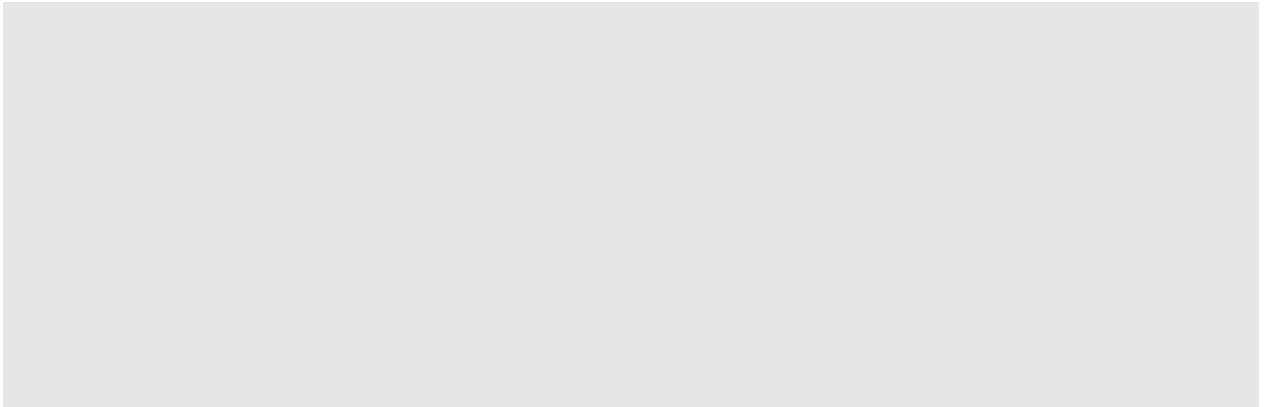
6. To Stay In Regular Touch With My Contacts and My Clients I Use The Following Tools:



Remember the Good Habits to Develop

Calm yourself and read your affirmations before beginning your prospecting activities.

The Affirmations:



Use your scripts and stay organized at all times.

Practice your scripts and be prepared to make adjustments.

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The Stepping-Up Approach To Business Success

EXPERIENCING THE WINNING EDGE *MODULE NINE* **NETWORKING INTELLIGENTLY**

A Gift from G.O.L.E.A.D.

Montreal, Quebec, Canada



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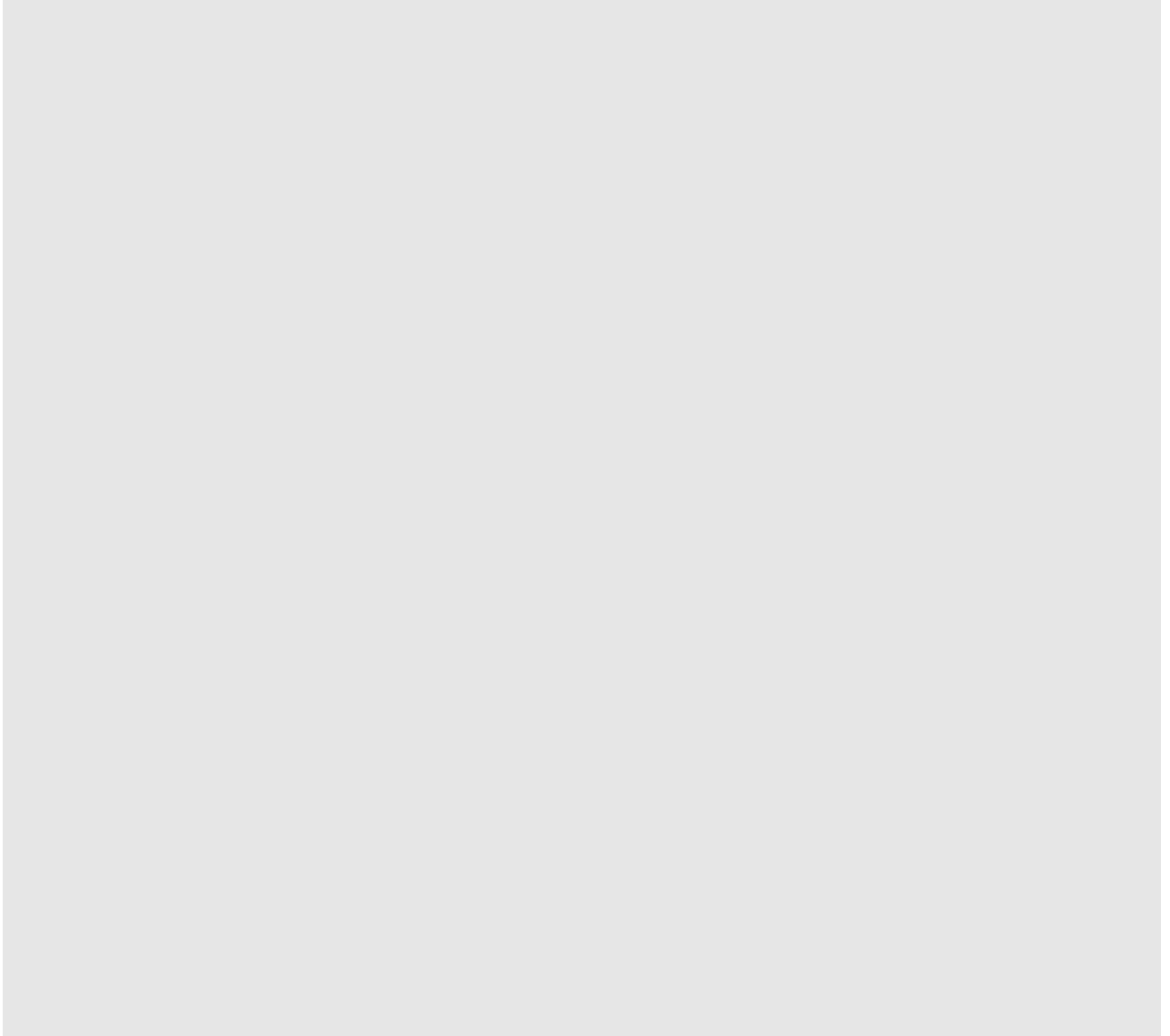
Objectives of Module Nine:

As a result of completing this Module, you should be prepared to answer the following questions:

1. What does it mean to network intelligently?
2. What are the benefits of networking?
3. What should your networking goals consist of?
4. How do you develop your network of contacts?
5. How do you activate your network of contacts?
6. What Are Some Useful Pointers Which You Plan to keep in mind when calling the people you know well?
7. What are some of the opportunities you can use to expand your network of contacts?
8. What are the things you can do to reward referrals?

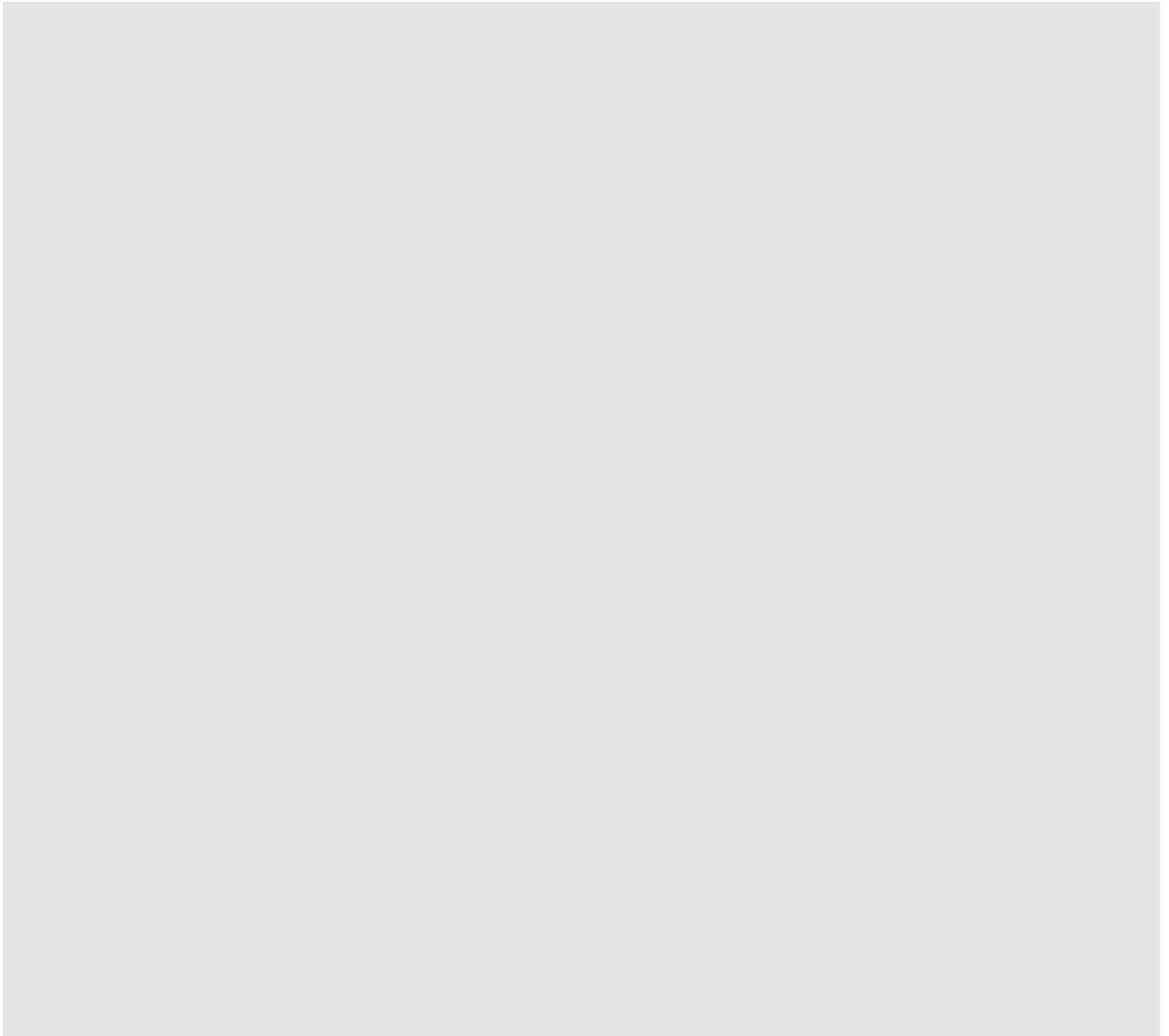
[CLICK HERE](#) to view the audio-visual presentation related to this section of the course.

Notes and Key Points to retain from this section of the course:



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Exercise A - Lists of People You Know

1. List of Friends and acquaintances:

People You know well and With Who You Stayed In Regular Contact

These could be relatives from your side or from your spouse's side of the family, friends from different schools you've attended, or from different jobs you've held. They can be close friends of your spouse, or people with whom you share a hobby, socialize with, or have helped in the past.

Name

Telephone number

Home or office

E-mail address

Name

Telephone number
Home or office

E-mail address

A large, empty light gray rectangular area, likely a placeholder for a form or data entry table, spanning most of the page width and height below the headers.

2) People Who Know With Whom You Are Not In Regular Contact:

These can include previous teachers, classmates, colleagues in and outside your departments at the different positions you've held, people on your mailing list or from your personal address book, people you deal with personally, your doctor, lawyer, dentist, accountant, plumber, electrician, insurance salesman, people you met on a vacation, union representatives, suppliers and customers you dealt with in your previous jobs, people you know from your place of worship, and so on.

Name

Telephone number

Home or office

E-mail address

Name

Telephone number
Home or office

E-mail address

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3) Your Current or Past Clients

The ones who are or have been satisfied with the services or products that you have provided them.

Name

Telephone number

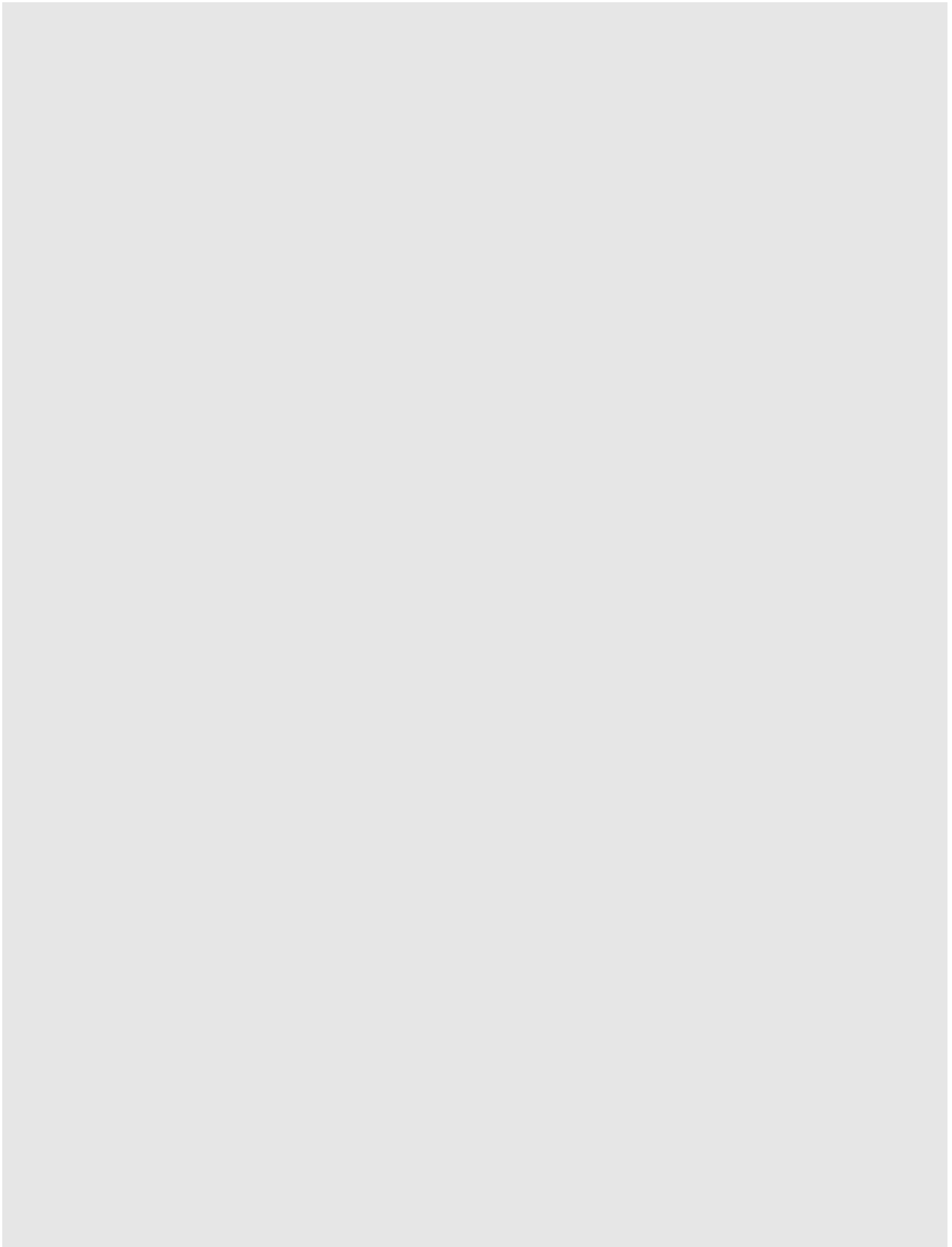
Home or office

E-mail address

Name

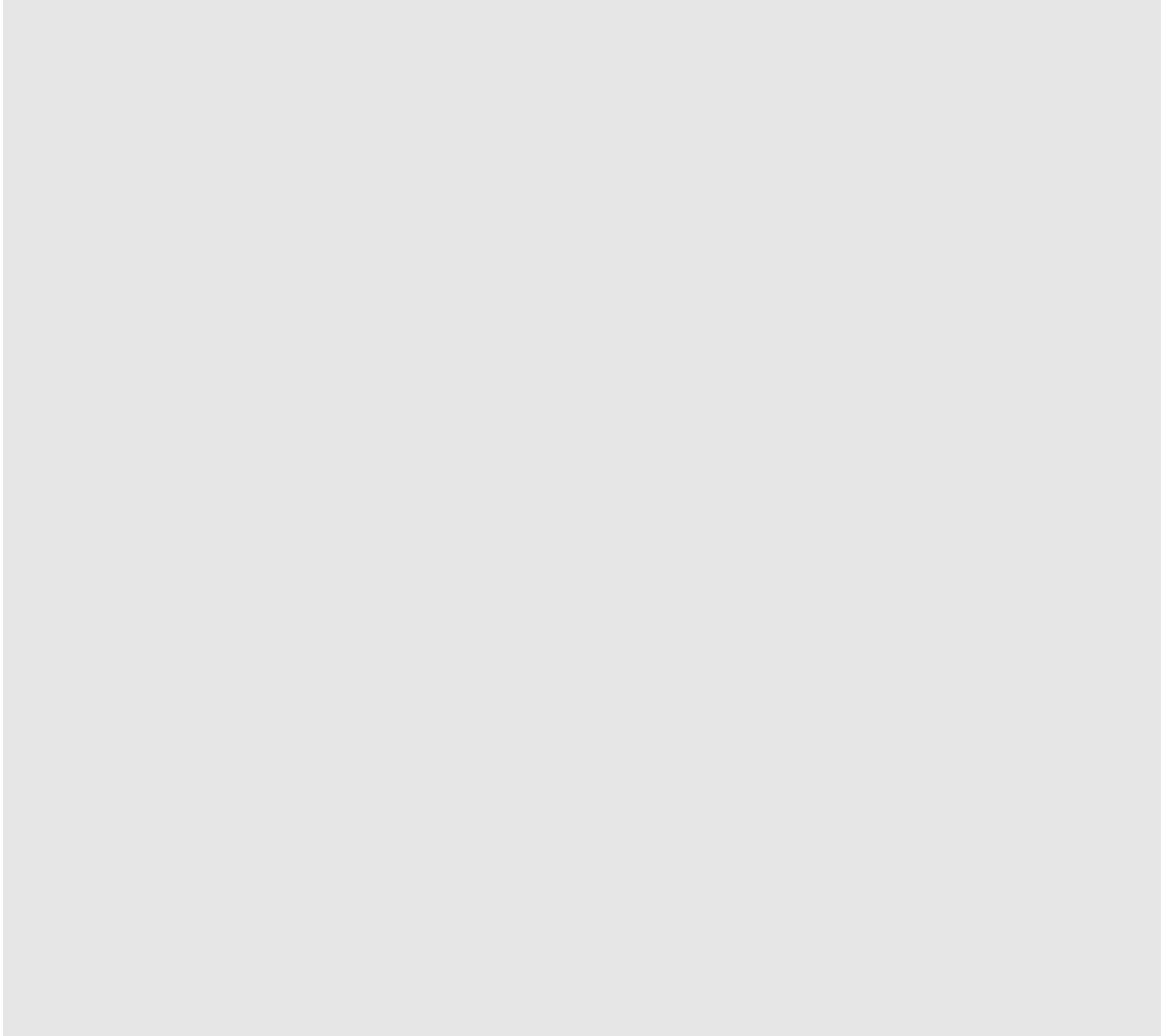
Telephone number
Home or office

E-mail address



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Exercise B - Your Script for Calling the People You Know

1. What will say to break the ice and if you have been in touch recently.

2. Your statement about what you do - the services and products that you provide - and the fact that you are trying to expand your business.

3. Your statement about the type of clients you need to find, in order to expand your business.

4. How you will ask them to think of anyone from among the people they know, that fit the profile of the type of clients you are interested in reaching, and to connect you to them?

- 5. How you will ask them if they also know people who might know contacts, who are likely to know the type of clients you are interested in reaching.**

- 6. How you will ask their permission to use their name when contacting anyone they have suggested.**

- 7. How you will ask them if they can send an e-mail to the contacts that they are referring in order to introduce you and to let them know that you will be calling and If they agree how you will propose to prepare for them a draft of the e-mail which they can use for this purpose.**

- 8. How you will thank them on the telephone, and find out if you can be helpful to them in any way**

Exercise C - Your Script for Calling Referrals

1. How you will introduce yourself.

2. Your statement of purpose for making the call

3. Your statement about what you do

4 How you will ask for the appointment or for subsequent action

Exercise D - How you will deal with the typical objections

a) I am too busy right now, why don't you call me in a couple of months.

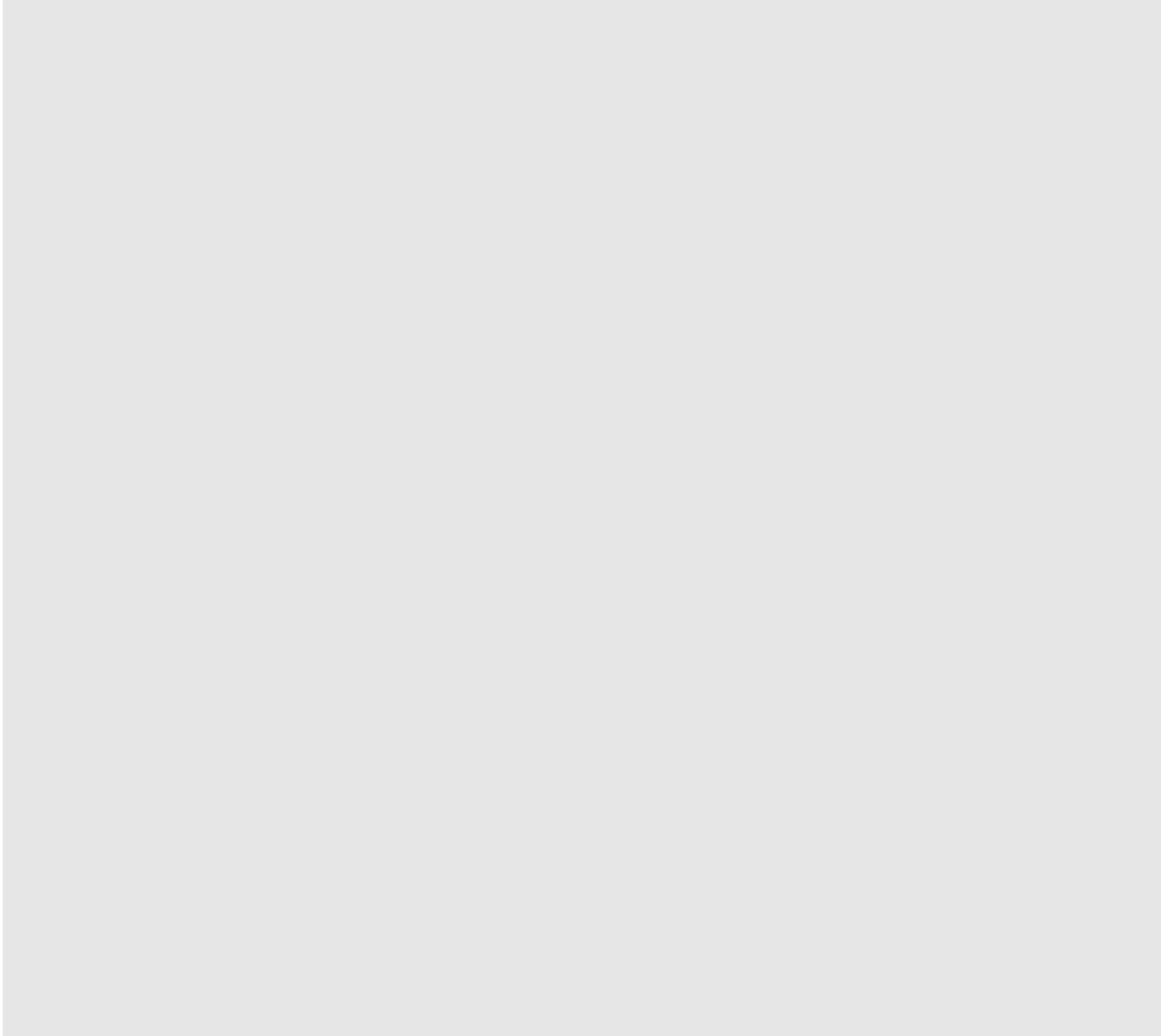
b) Why don't send me some information by e-mail?

c) I am not really looking at making any changes to my current suppliers.

d)

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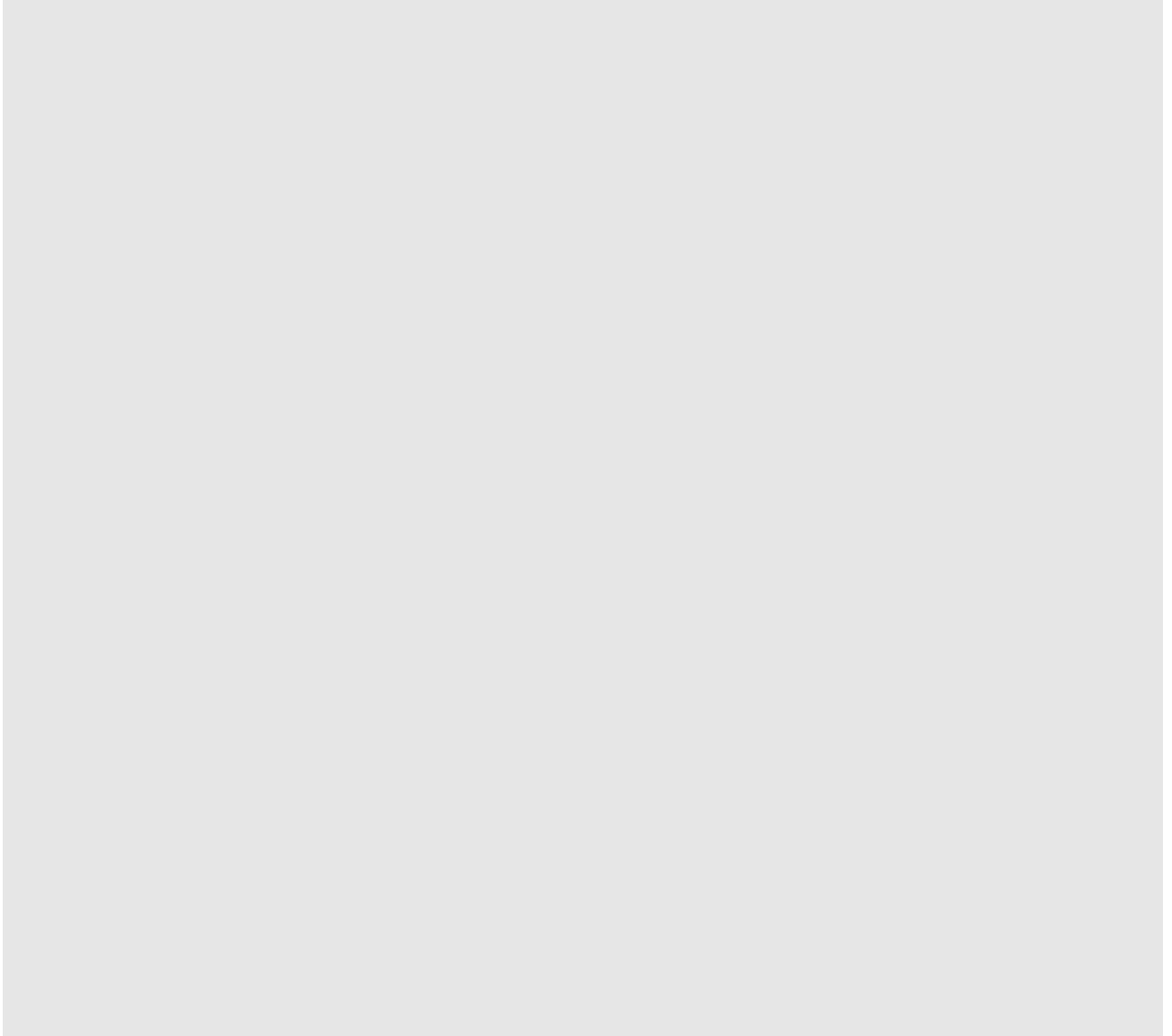
Exercise E – Your Networking Activities

[illegible]

Exercise F - Your Networking Budget for the Next 12 Months

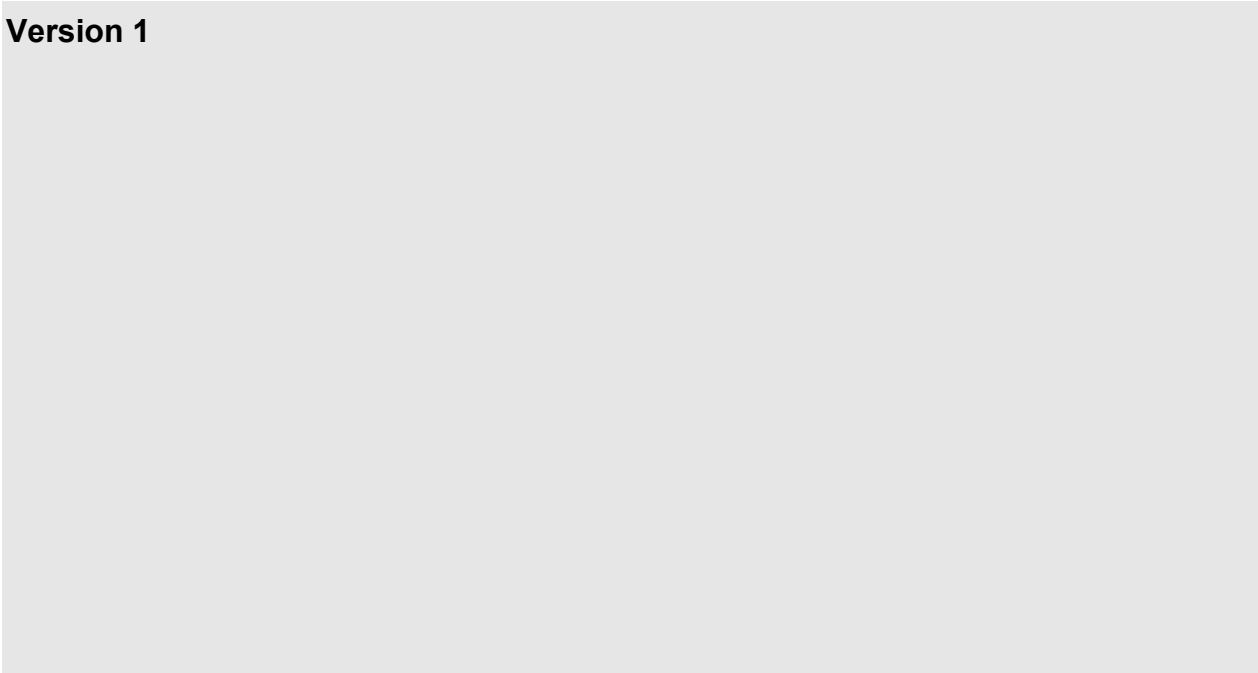
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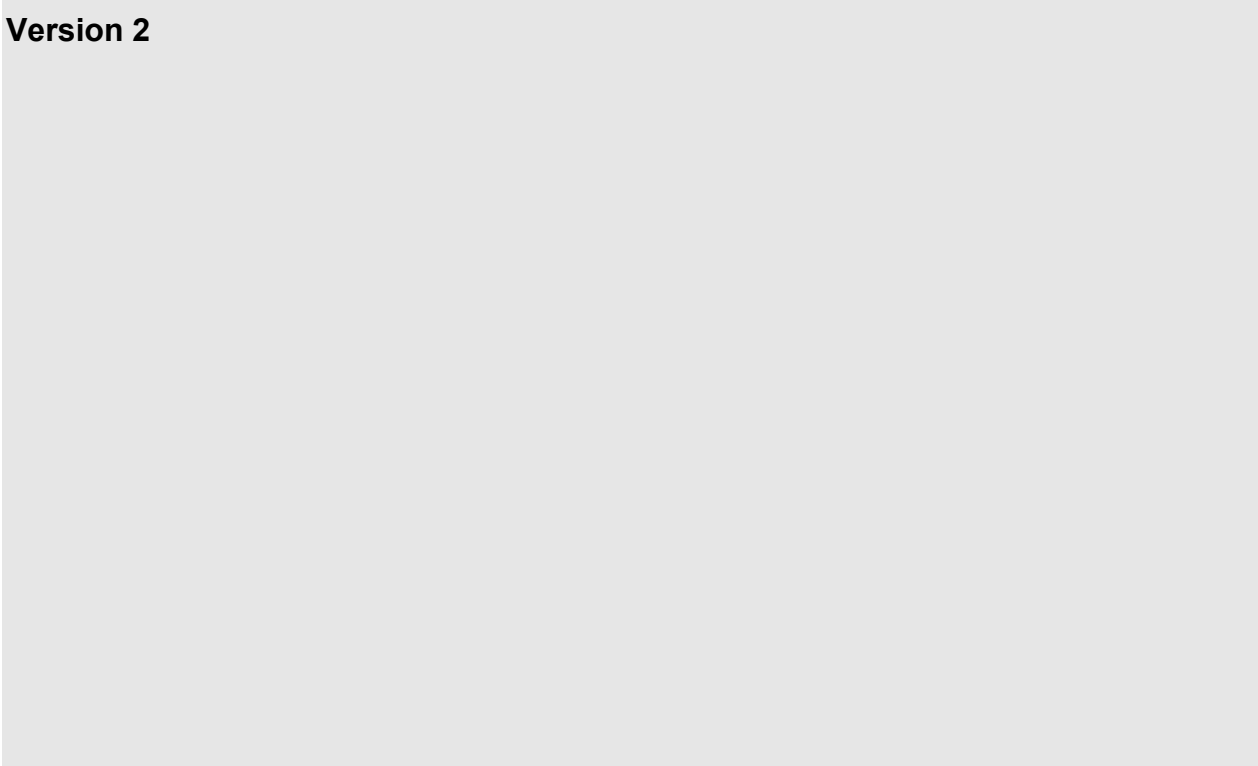


G) Your Infomercial *(Using curiosity)*

Version 1



Version 2



H) How You Plan To Continue or To Start Rewarding Referrals

About The Author

George Beshara

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The Stepping-Up Approach To Business Success

**EXPERIENCING
THE WINNING EDGE
MODULE TEN
*IDENTIFYING CLIENT
NEEDS - ASKING THE
RIGHT QUESTIONS***

A Gift from G.O.L.E.A.D.

Montreal, Quebec, Canada



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Course Materials updated March 2025

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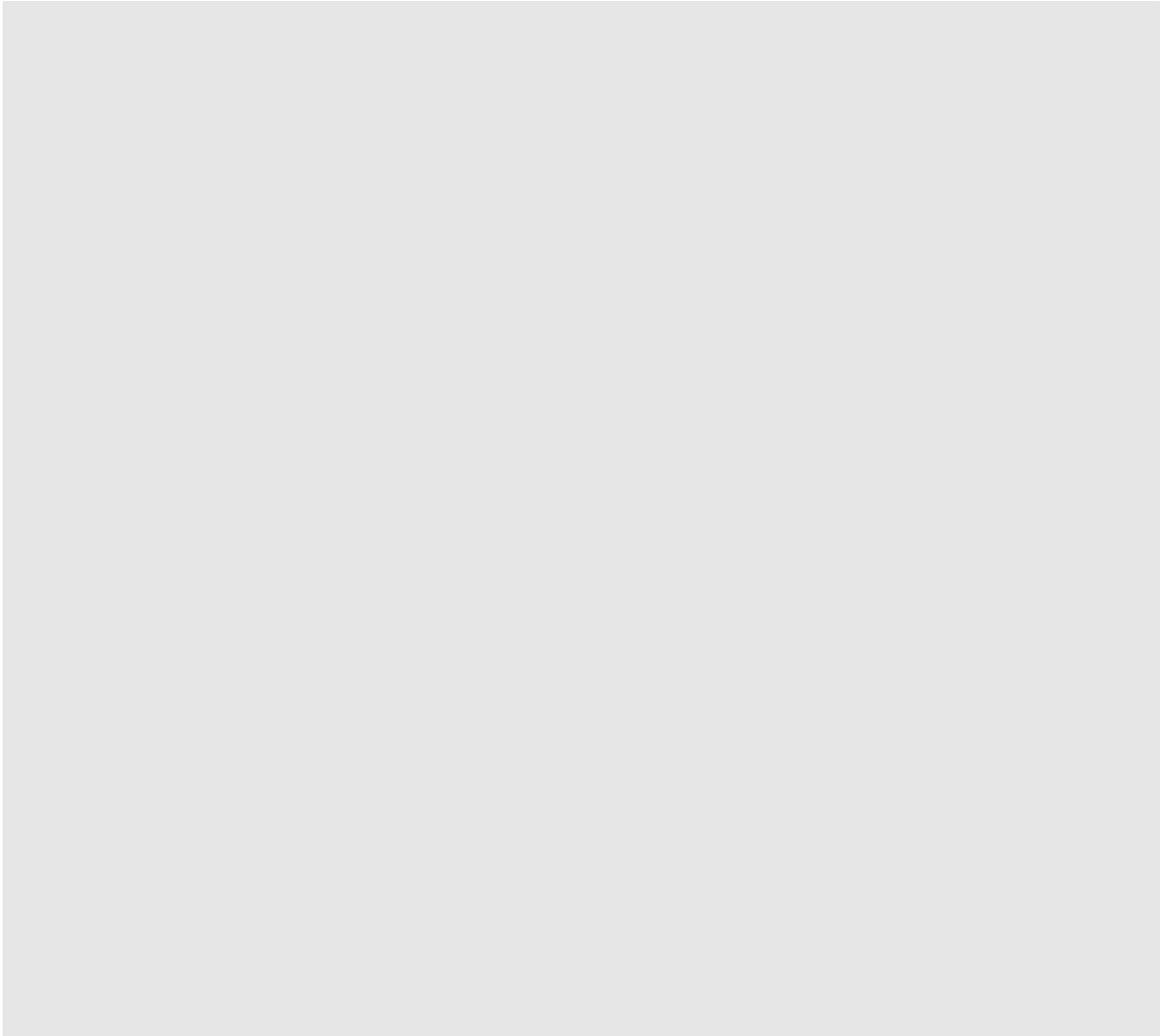
Objectives of Module Ten:

As a result of completing this Module, you should be prepared to answer the following questions:

1. What are the four parts of the sales meeting and what percentage of time should be spent on the various parts?
2. What are the preparatory steps you need to take before attending a meeting?
3. Explain the behavior of extroverted and introverted prospects.
4. What should you remember about your own body language and the pace of the meeting?
5. What should you observe about prospective clients?
6. What are the eight steps you can use to control the meeting?
7. What can you accomplish by asking good questions?

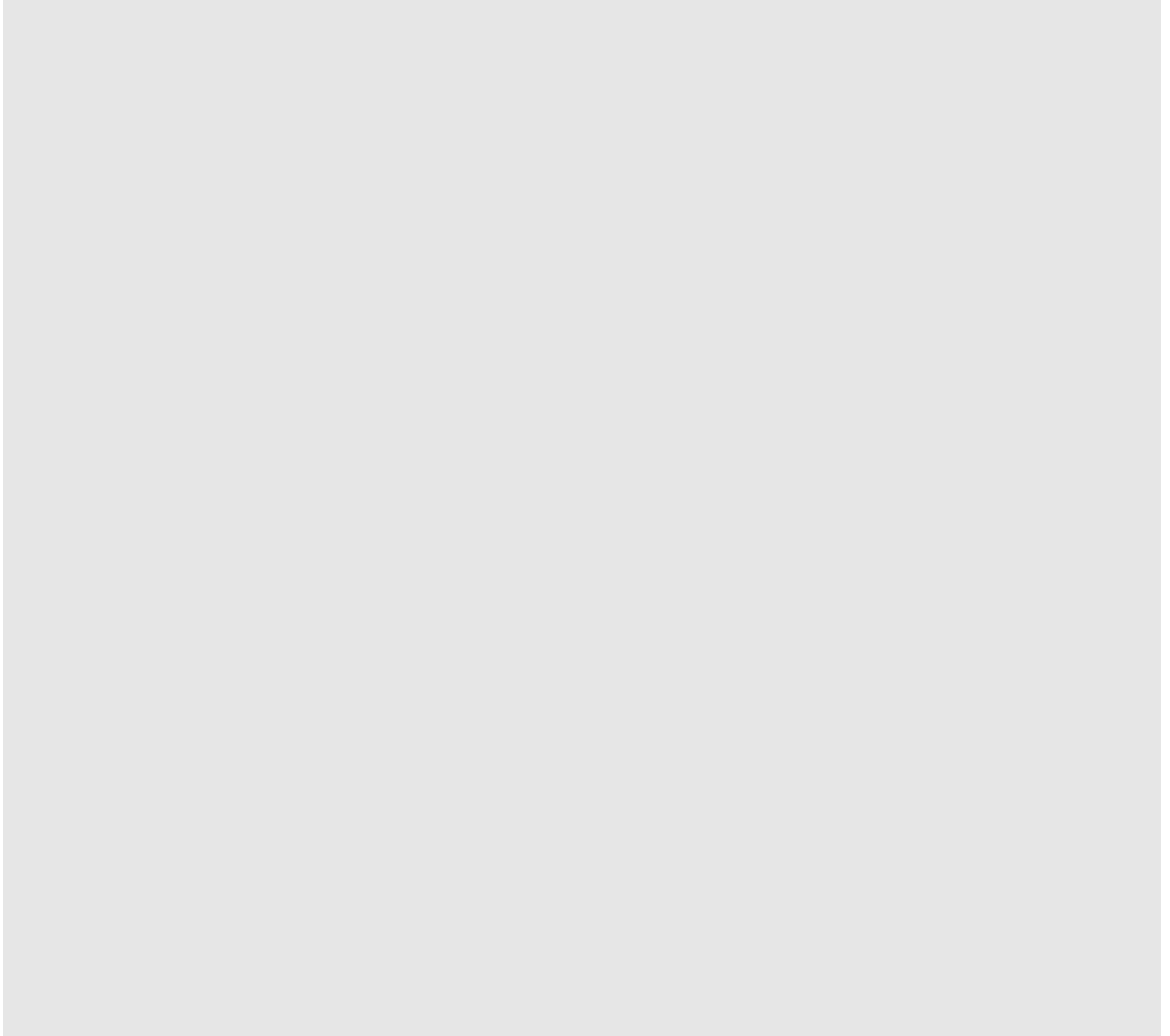
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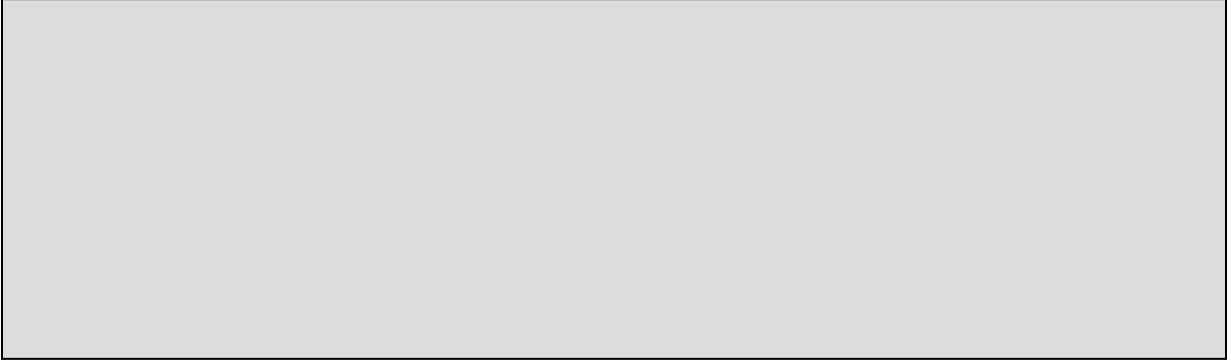
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Exercise A - Controlling the Meeting

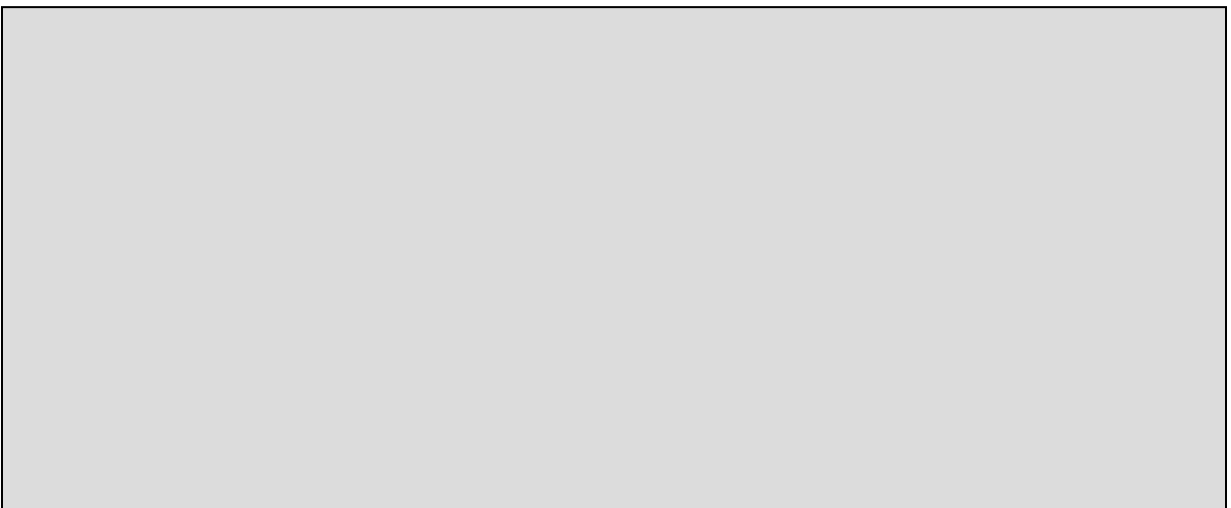
1. Things You Can Say To Break the Ice



2. How You Will State Your Purpose of the Meeting



3. How You Will Briefly Describe Your Background and Experience and The Products and Services You Offer



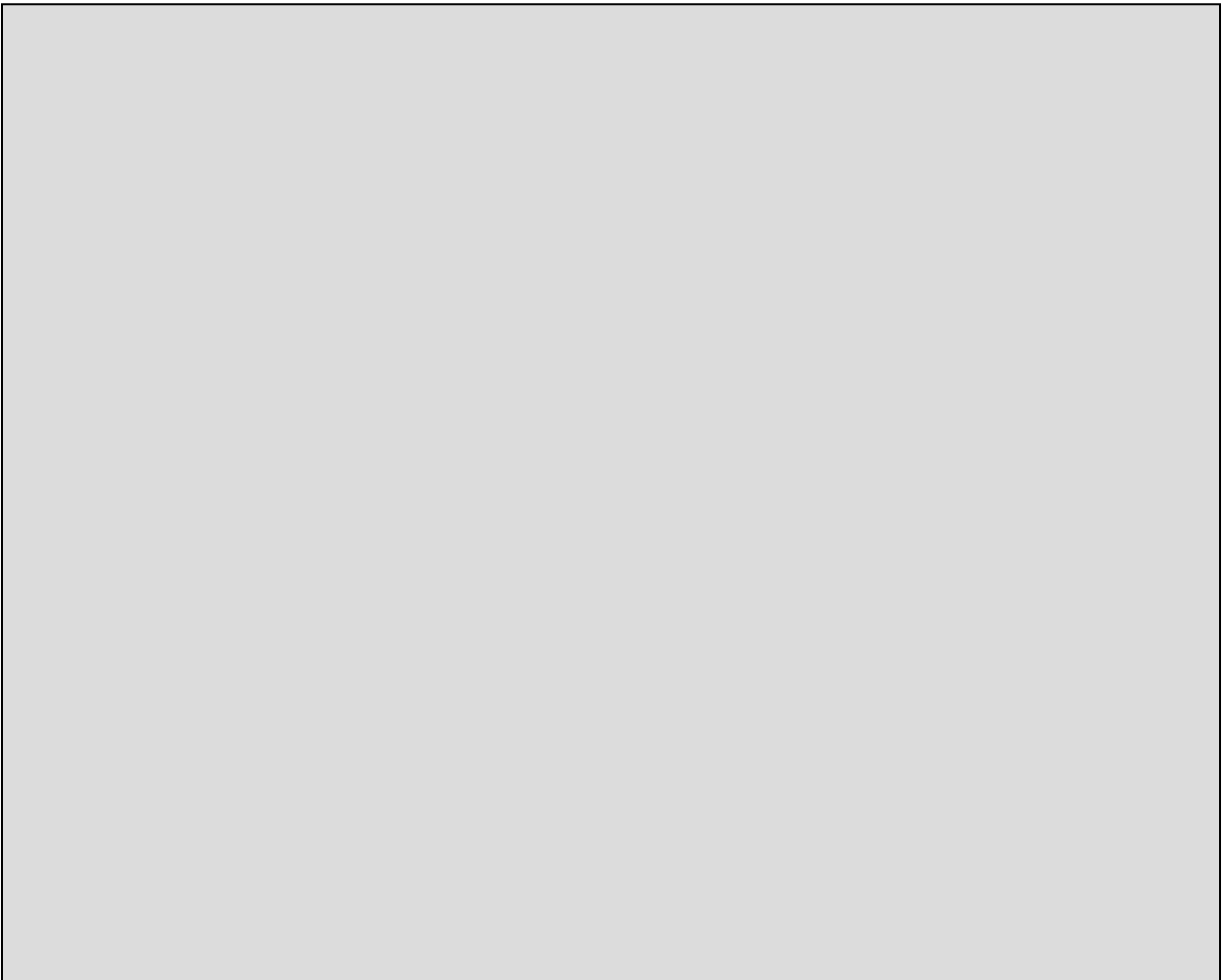
Exercise B – Questions You Will Ask

- a) Open-Ended Questions That You Can Ask That Will Help You Get To Know Your Clients And Their Needs For Your Products Or Services:** *These questions typically begin with: “What, where, why, how and when.”*

General Questions To Get To Know Your Clients And To Increase Trust



Questions That Will Elicit Needs For Your Products and Services

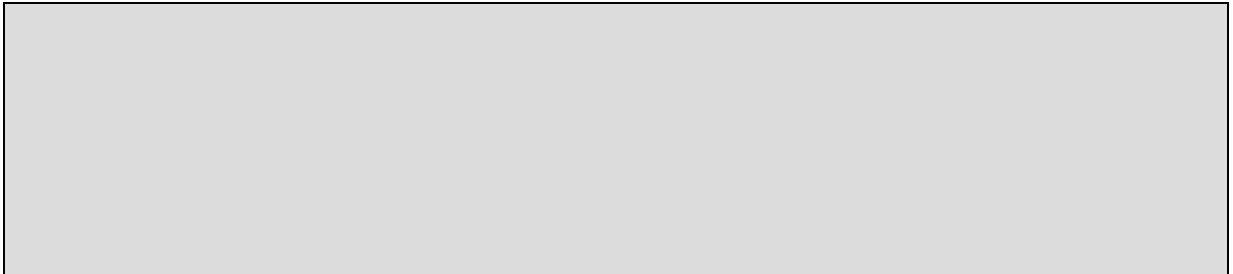


- b. The fact-finding questions which are also important. For that purpose you can use either close-ended questions which can be answered by YES or NO or by a few words, or by using open-ended questions.

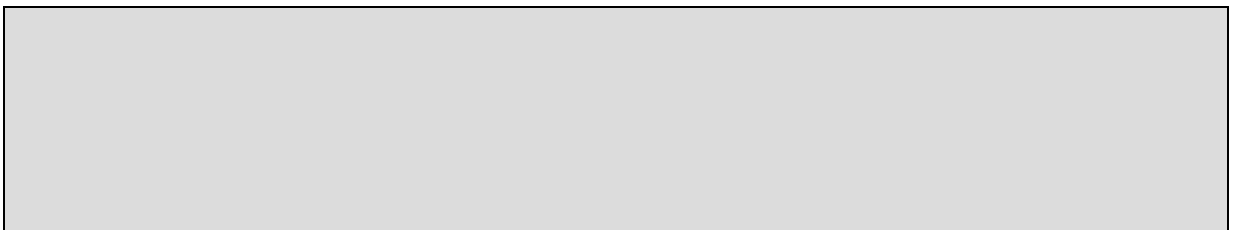
The problems they have which can be resolved by products and services you offer.



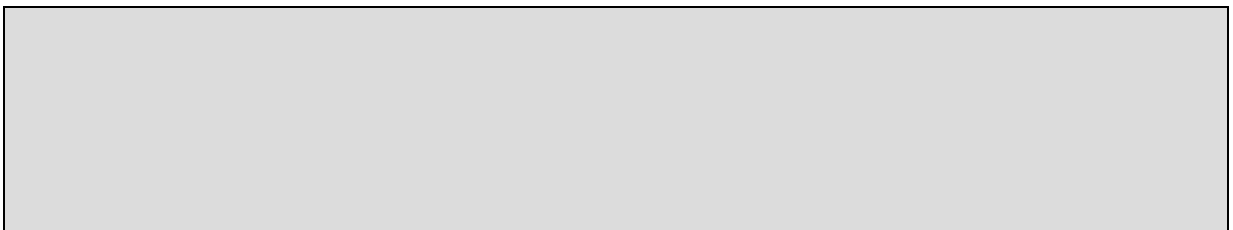
What are they currently doing to deal with those types of problems?



What do the prospects need versus what they really want?



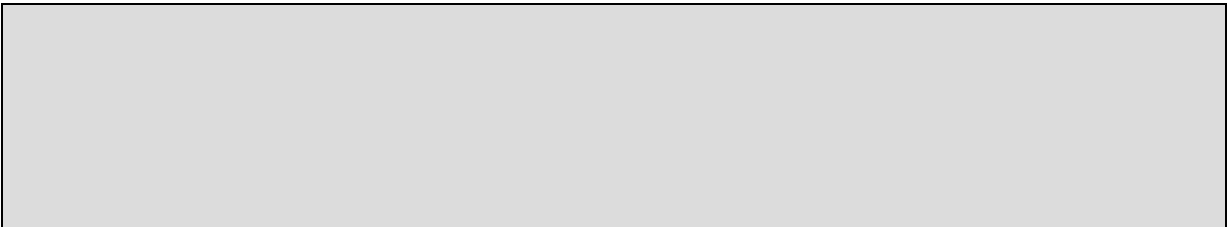
Who will make the buying decision?



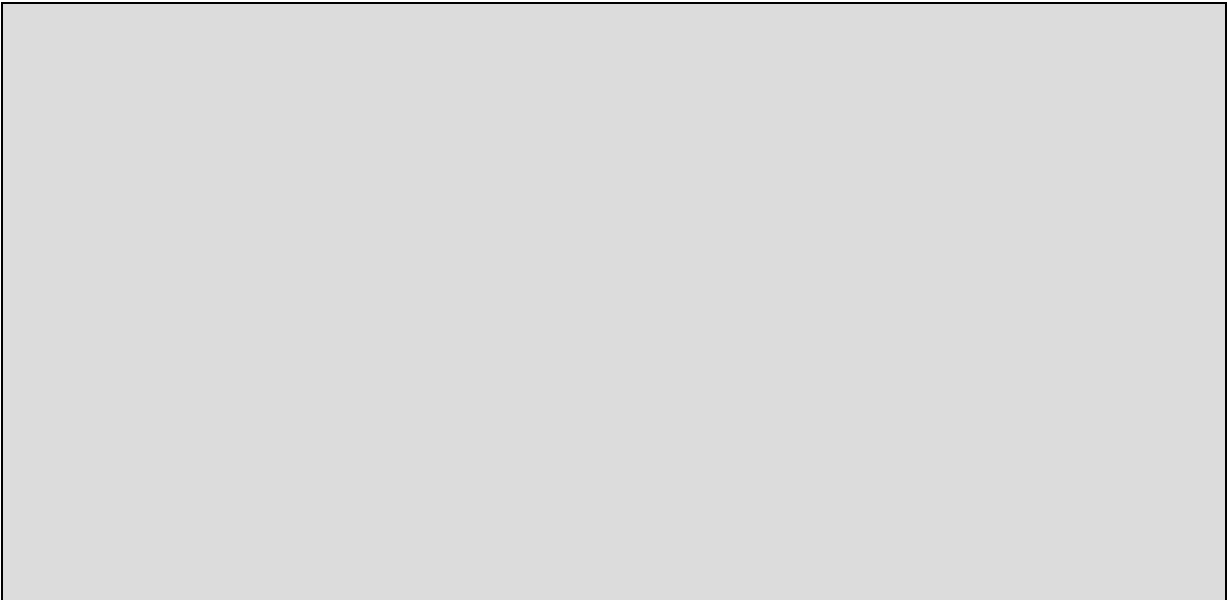
**Where do they really stand in the buying cycle for your products and services?
The Timing?**



How will they pay for your products or services?

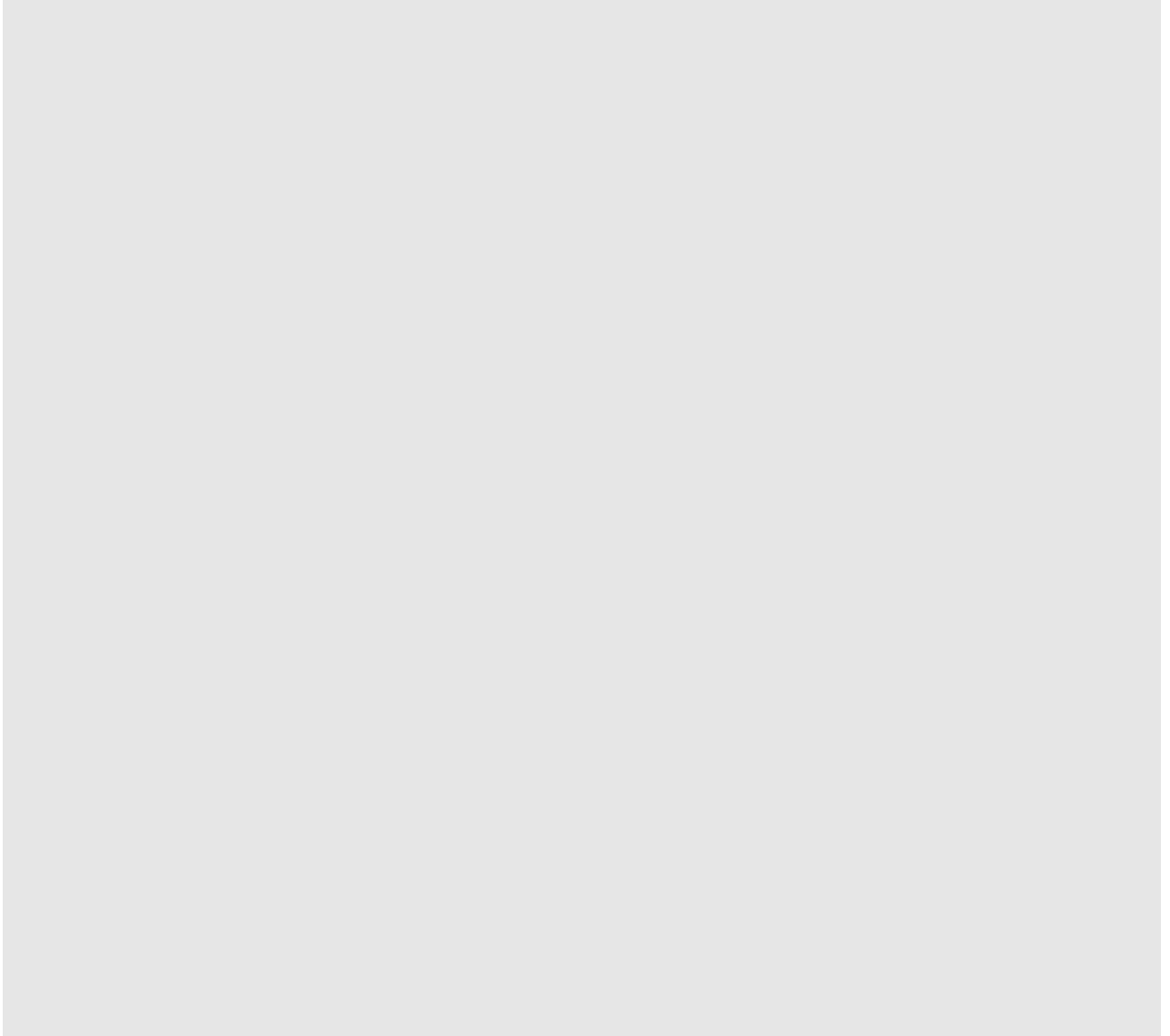


C. Feeling questions are essential to determine the motivation of your clients. Remember our clients buy based on their emotions and then they rationalize their decisions with facts.



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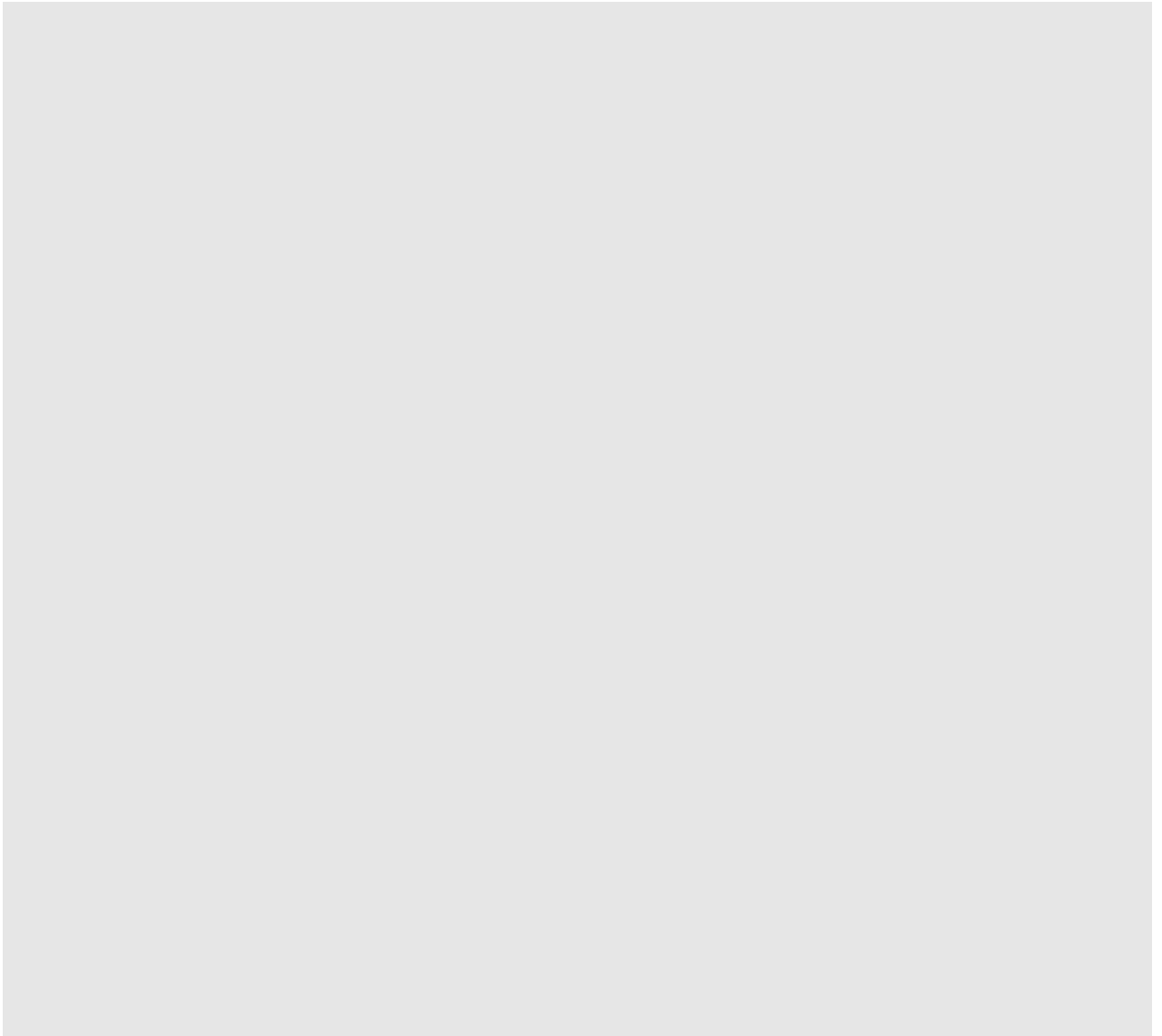
Objectives of Module Eleven:

As a result of completing this Module, you should be prepared to answer the following questions:

1. What are the 7 factors to remember when making a sales presentation?
2. What are the 4 building blocks of a sales presentation?
3. To purchase, what should clients need to trust?
4. What are the buying signals you should be looking for?

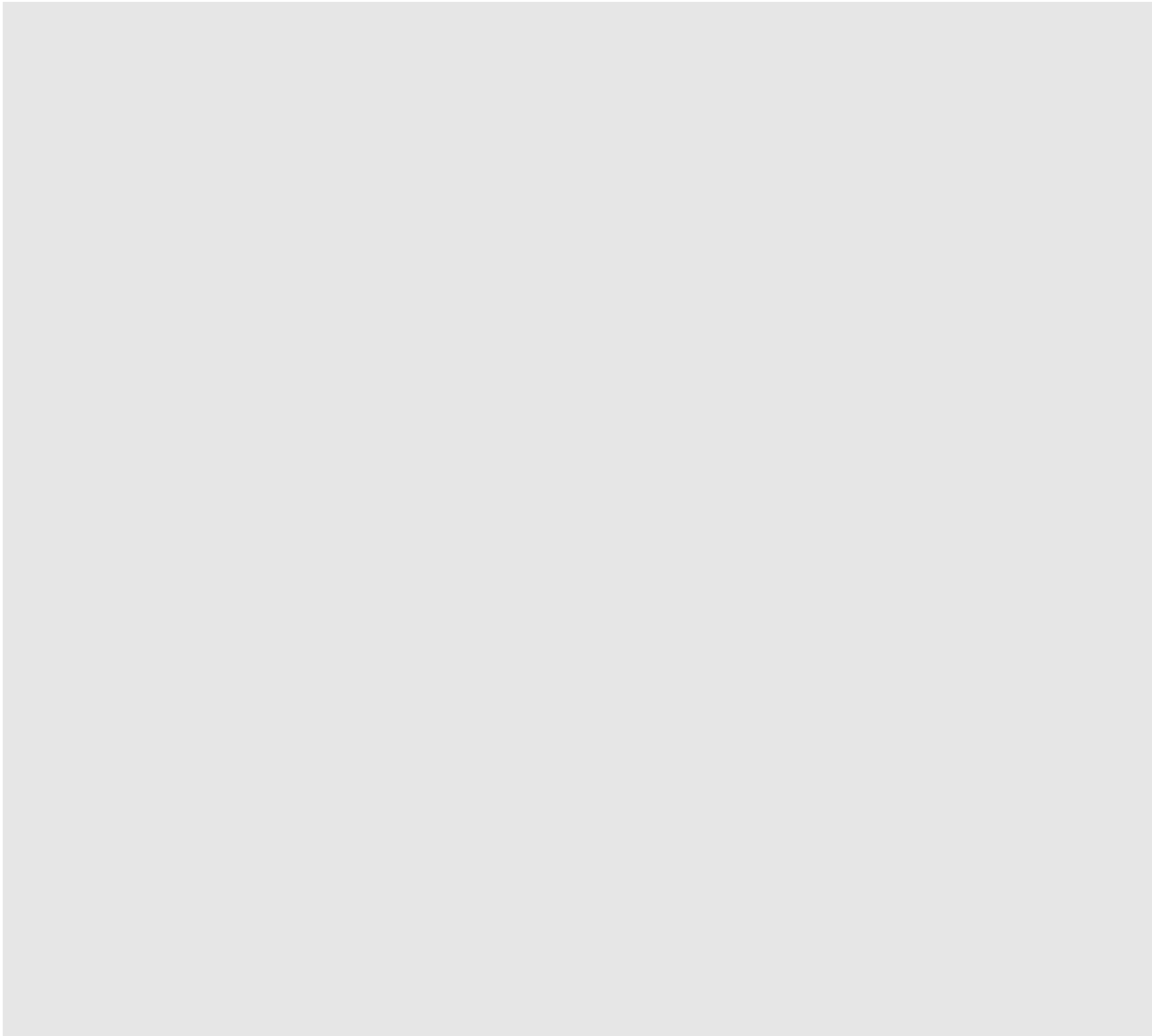
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Exercise A: Preparation for Your Presentation

(Review and customize if possible before making your sales presentation)

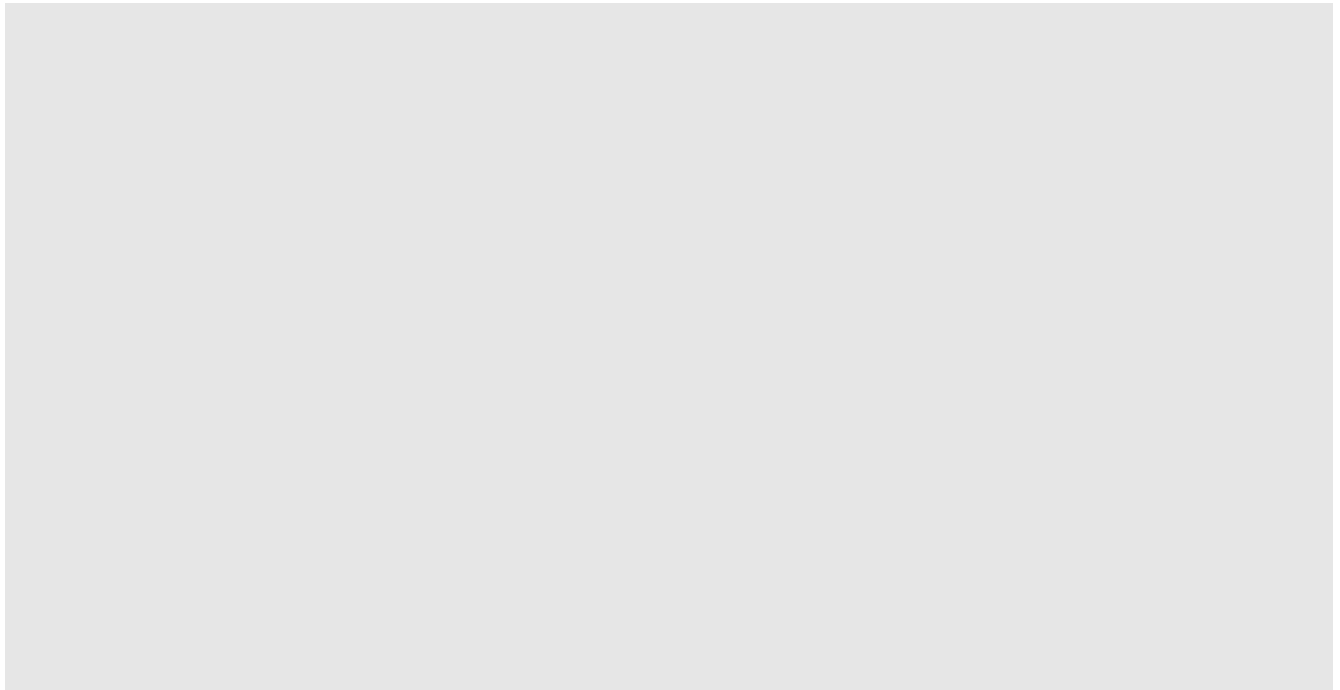
Step One of the Presentation:

Phrase(s) you want to use from now in order to recap your understanding of your client's needs before beginning the presentation:

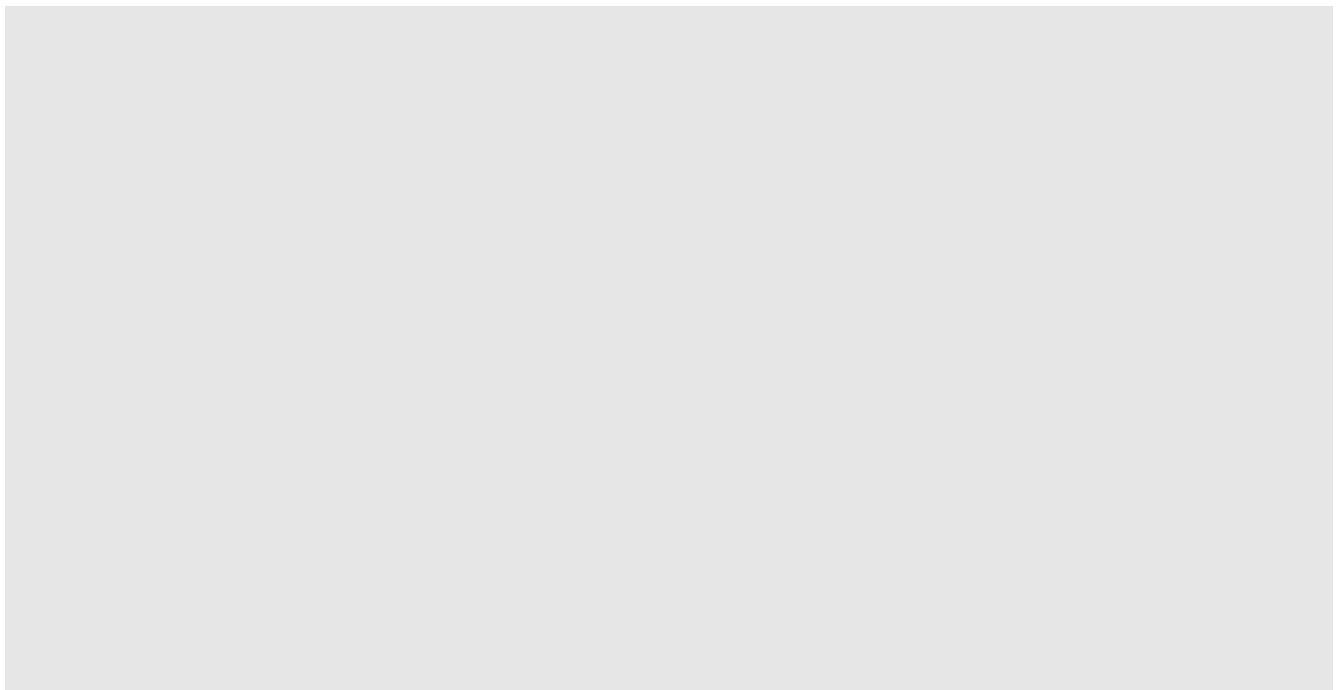
Step Two of the Presentation:

The (solution) I that I am proposing will lead to ... (benefits)

Product or Service:

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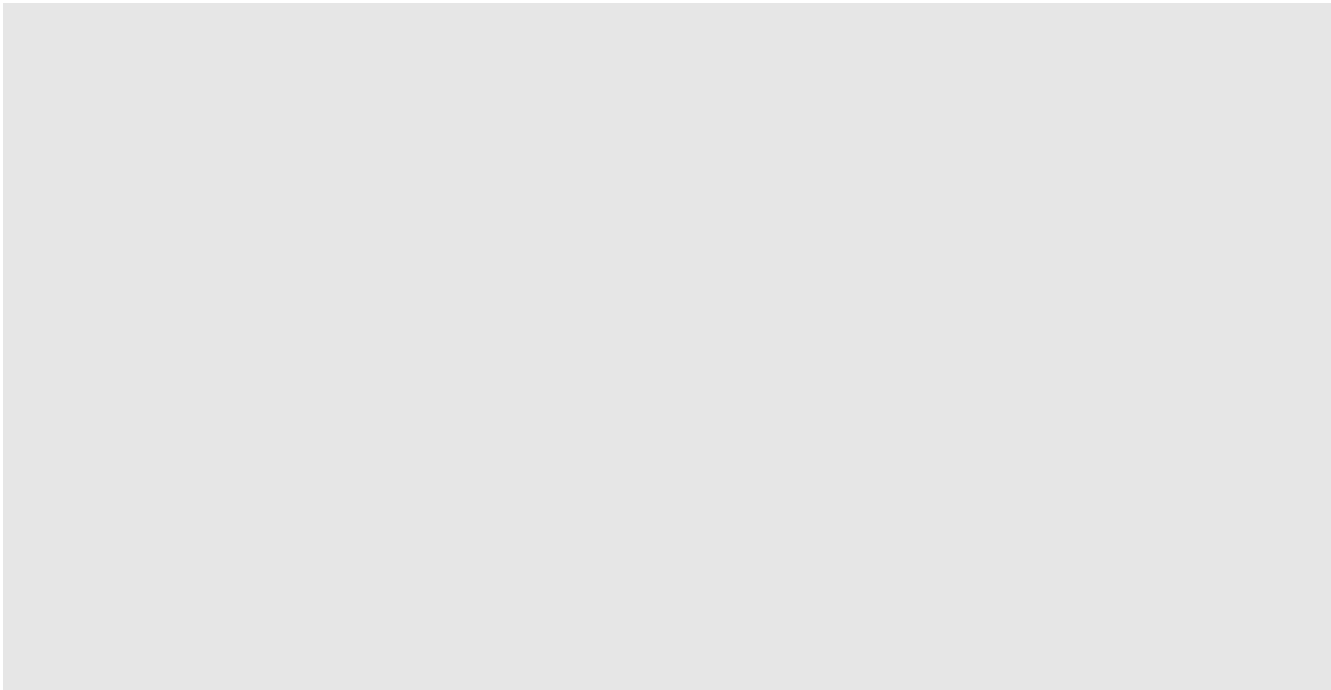
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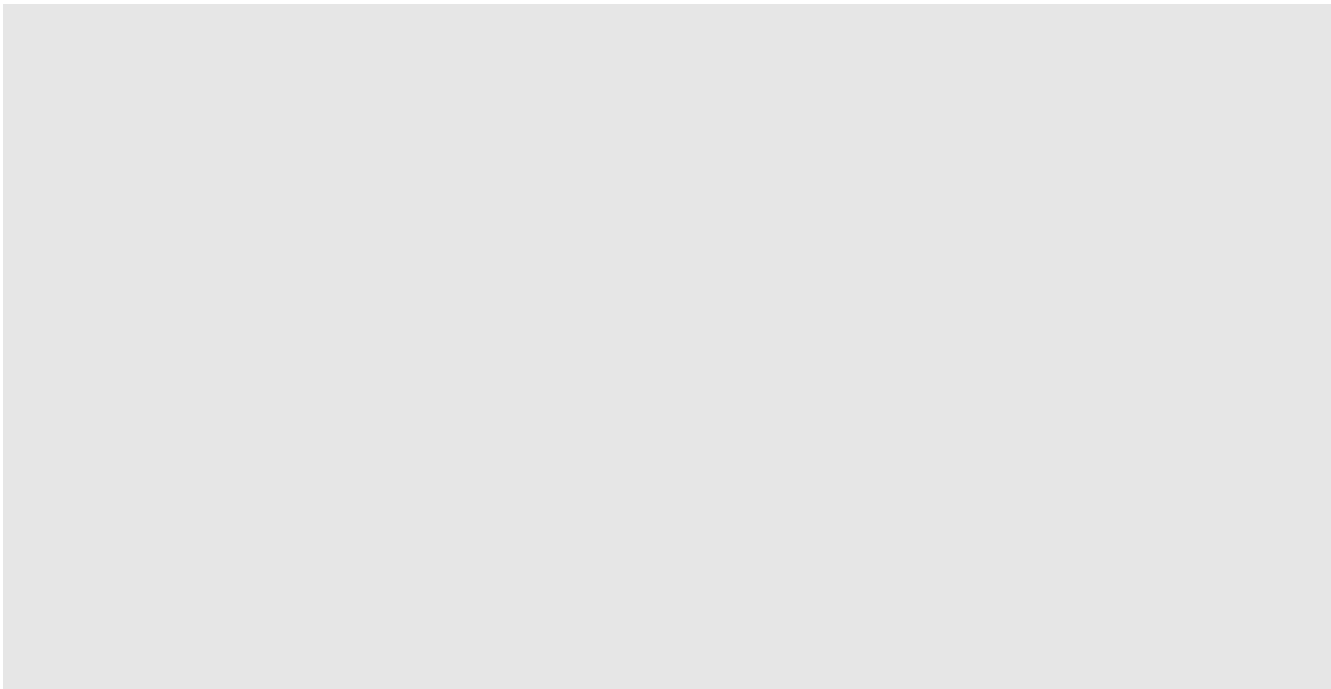
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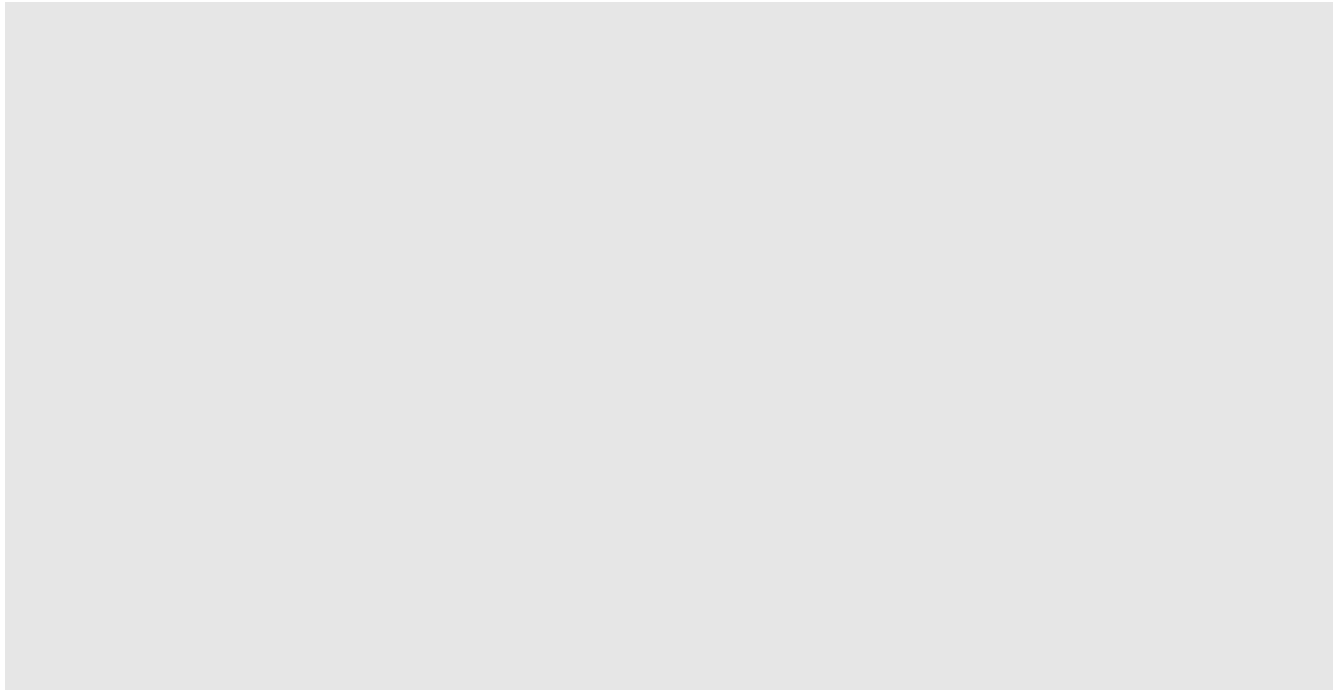
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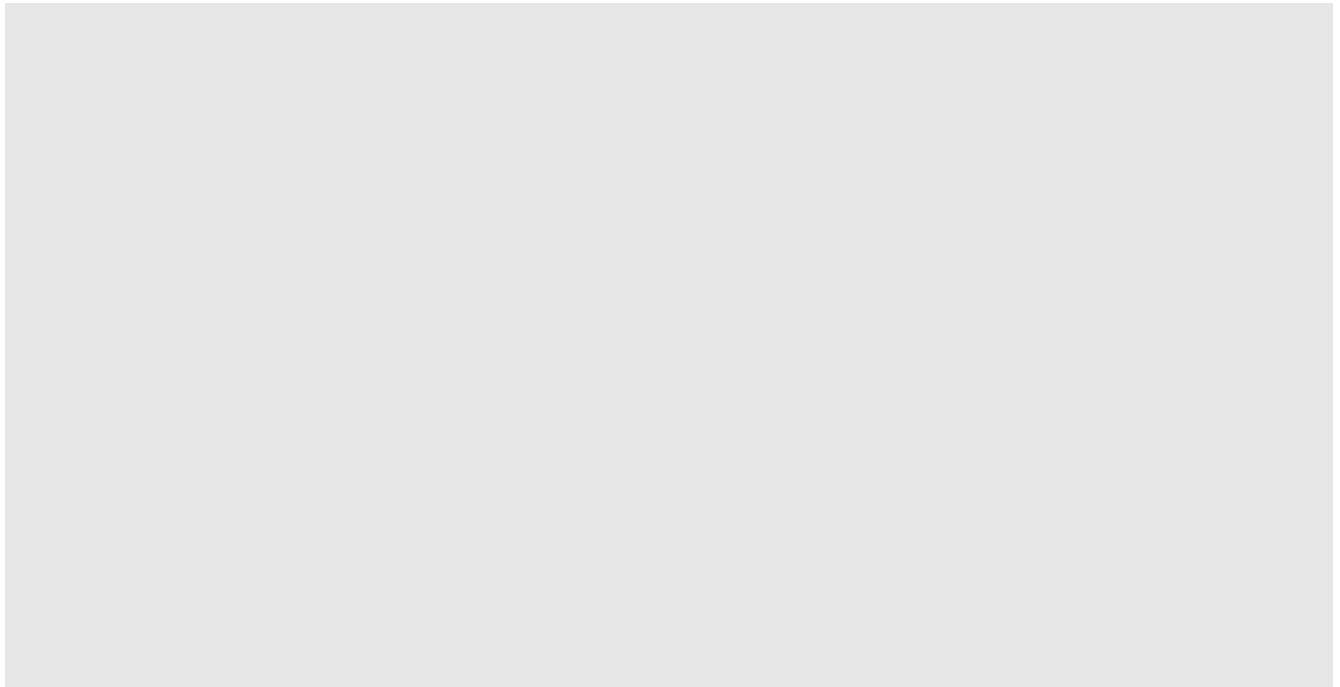
Step Three of the Presentation

The ... (solution) involves ... (features). The immediate benefit (to the individuals who will be using the products or services) **is ... For your company this means ... And for you personally** (the decision-maker) **it will mean ...**

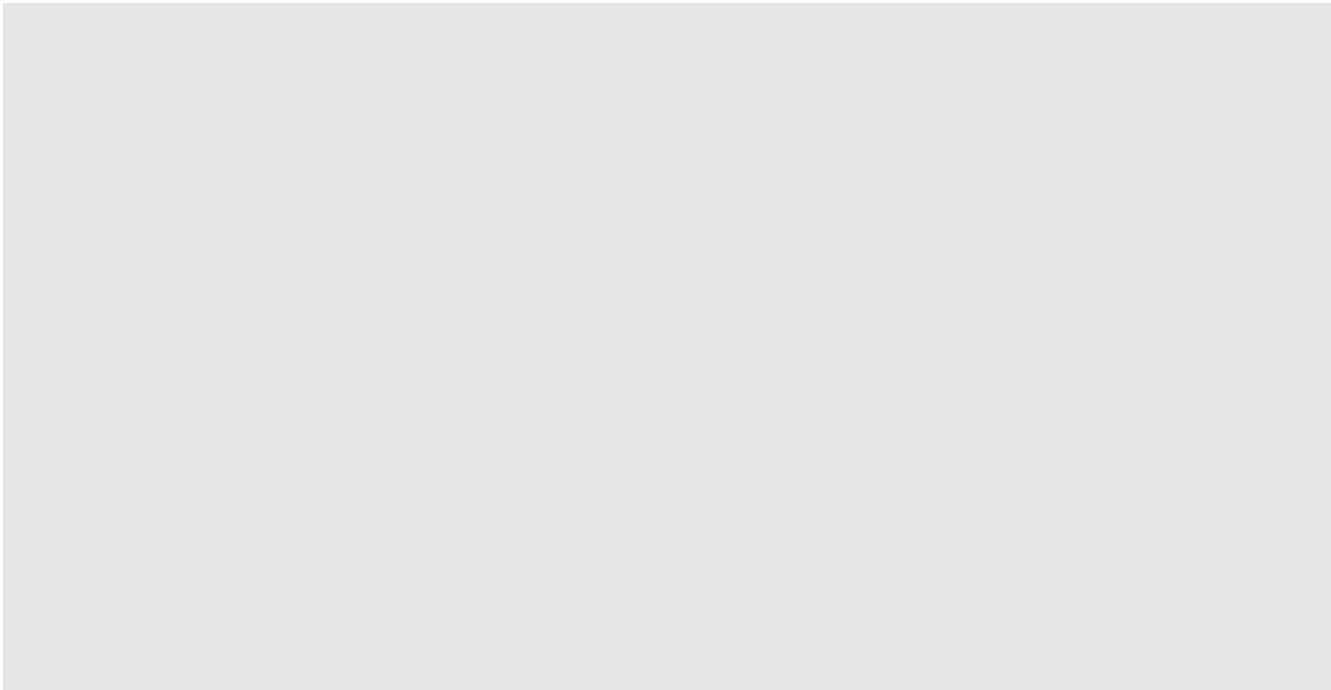
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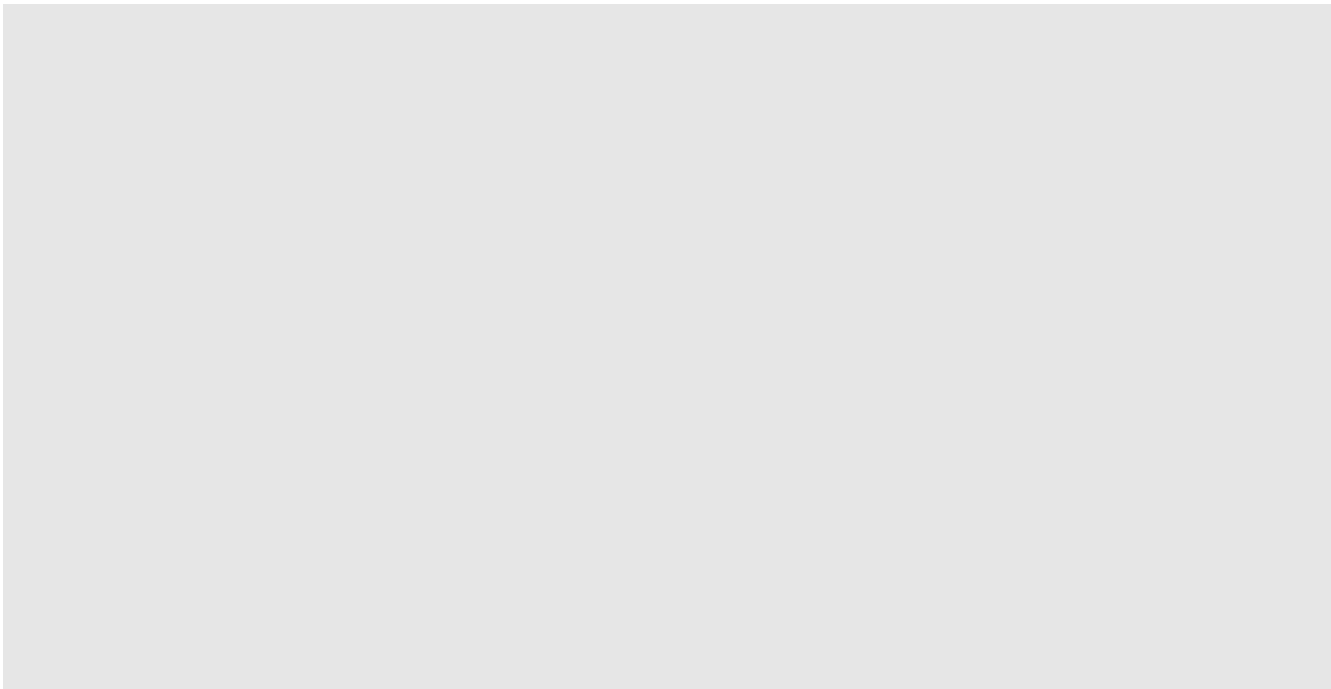
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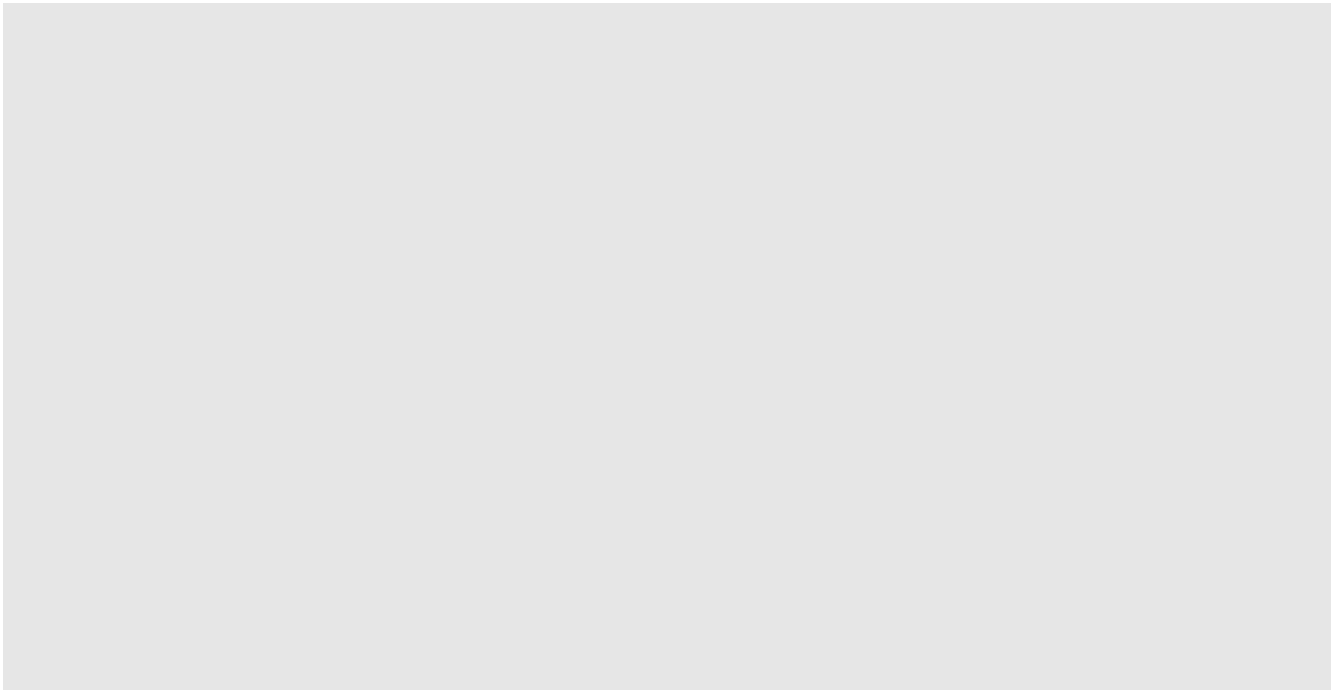
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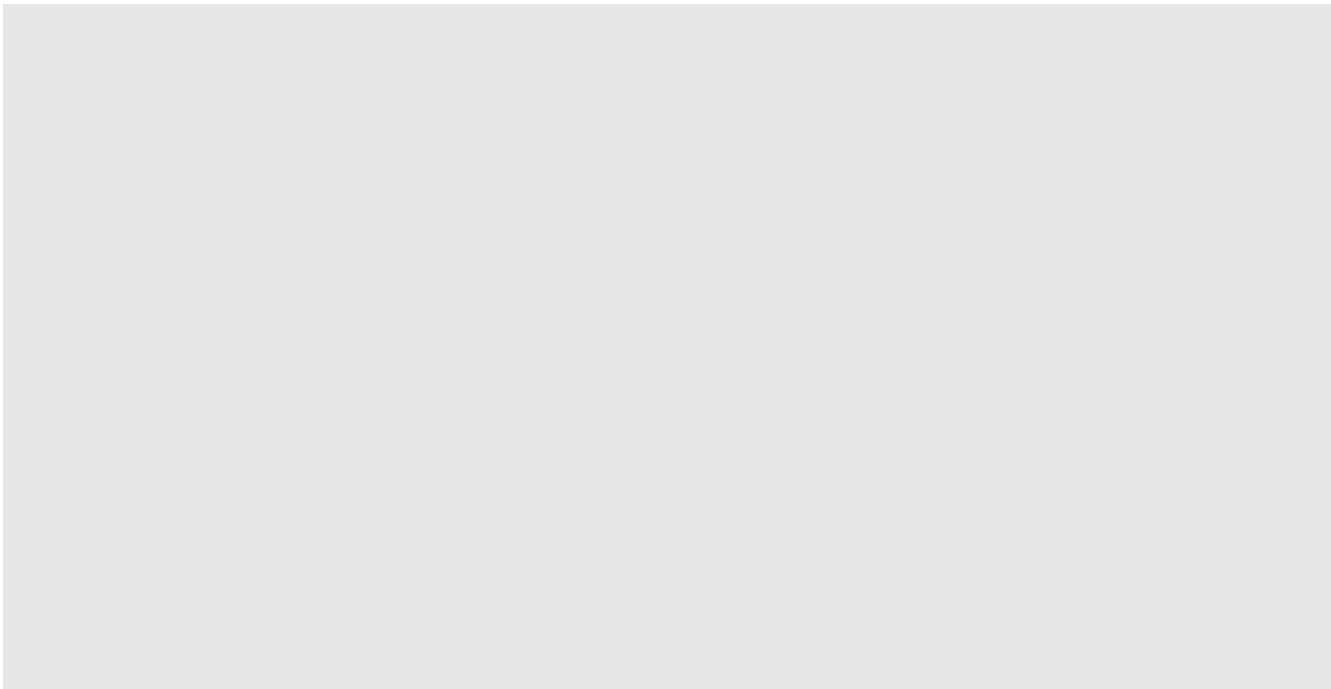
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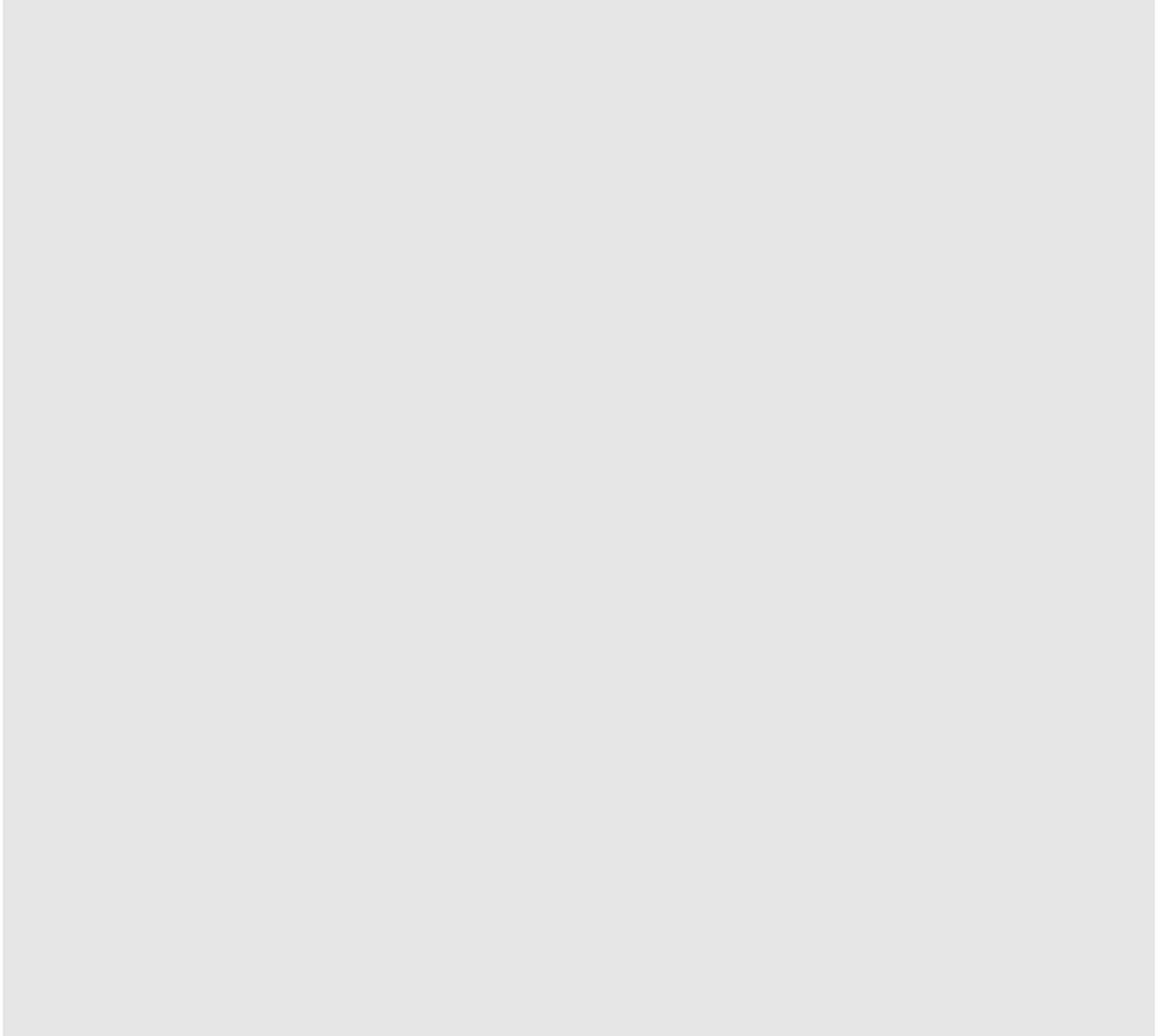
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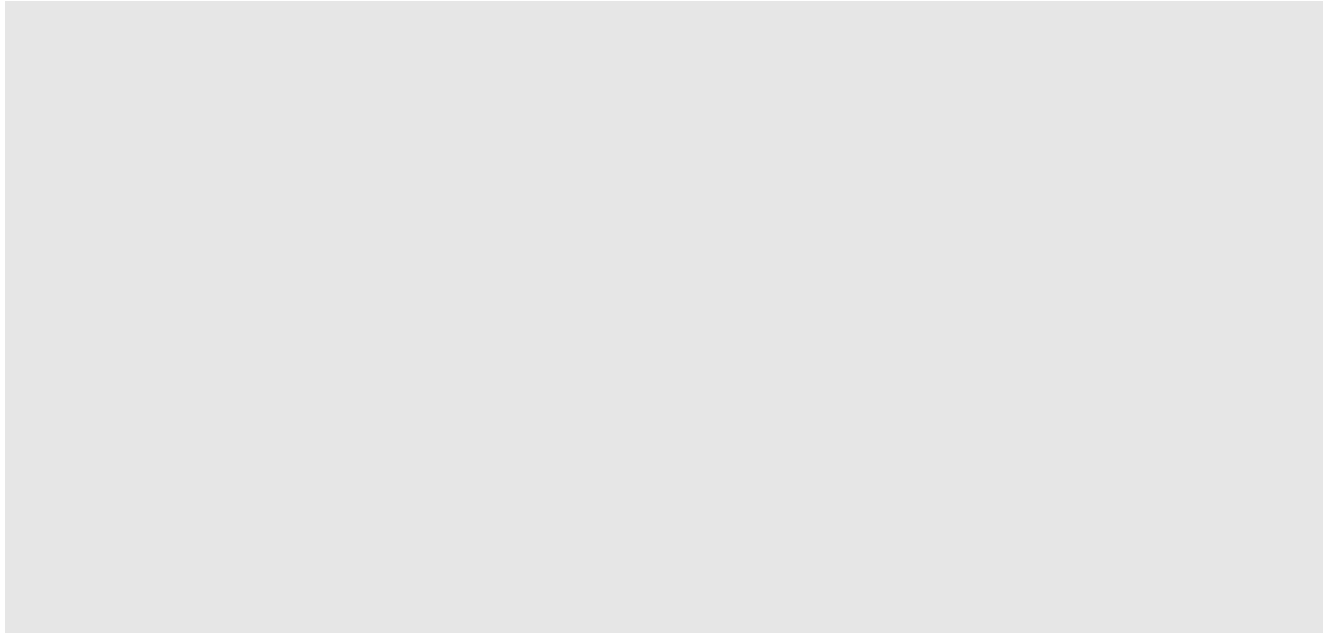
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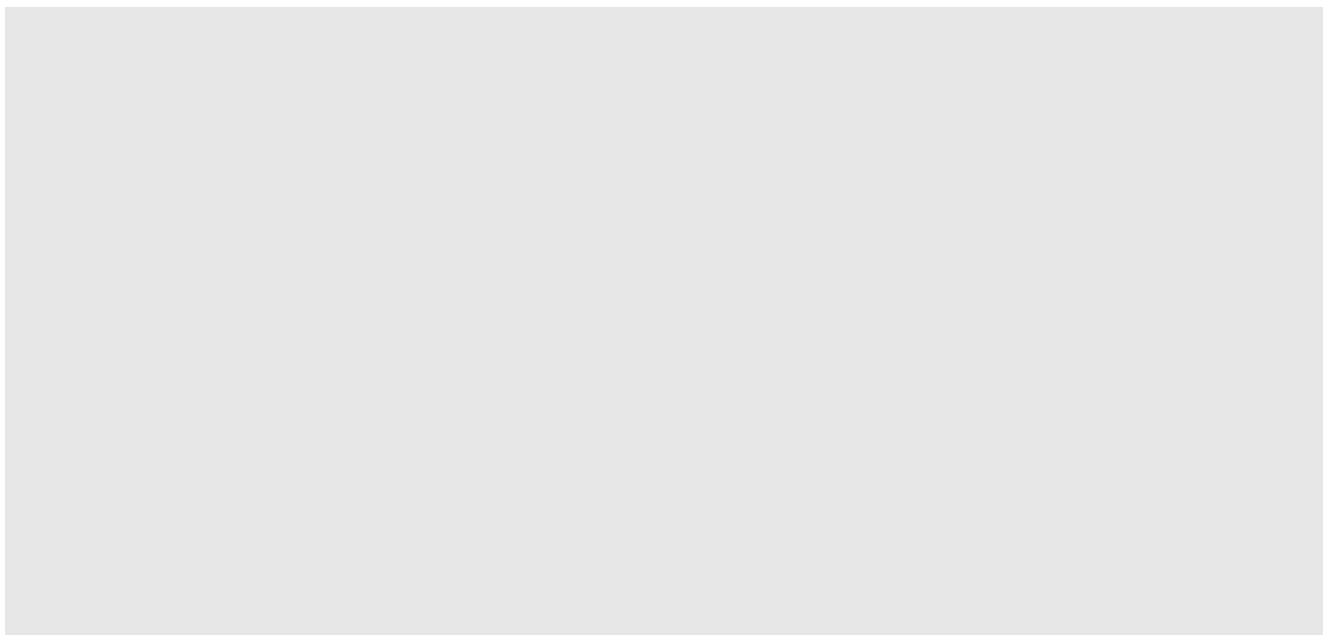
Step Four - The Proof

Relevant stories, testimonials, portfolio, research, articles, documentation, promotional brochures, visual aids, etc...

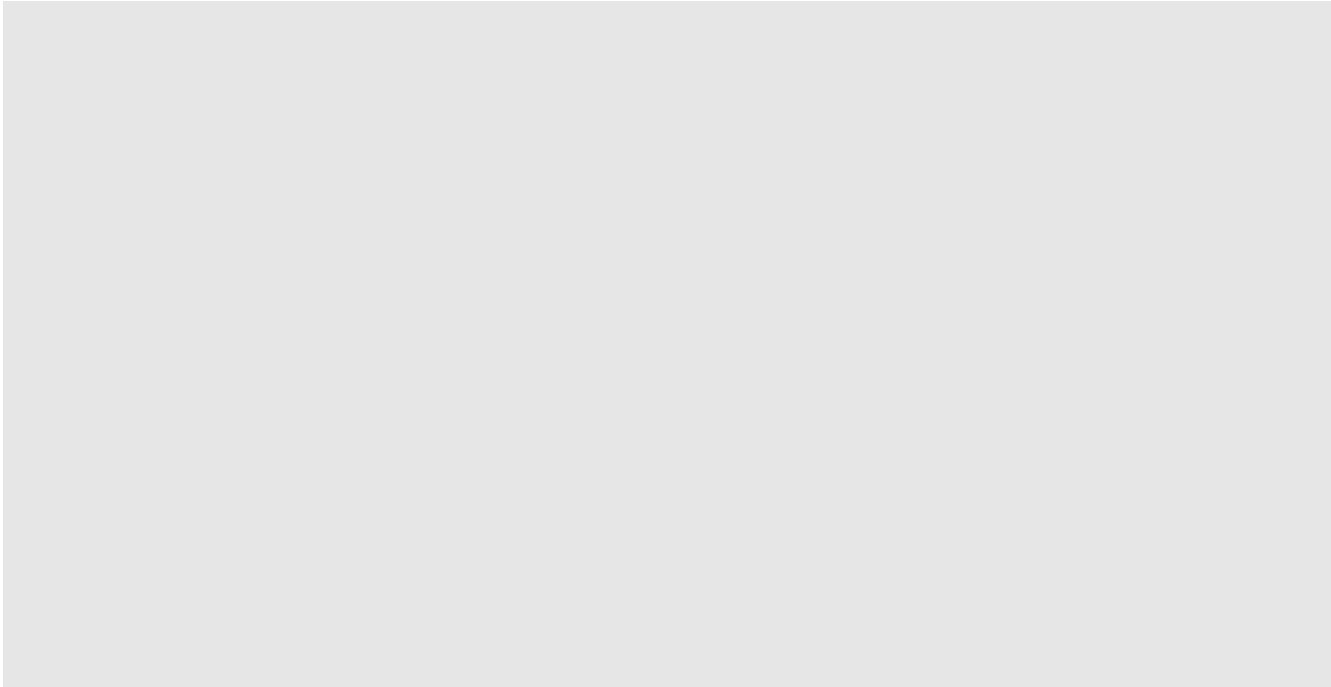
To Create Trust About Your Integrity and Qualifications



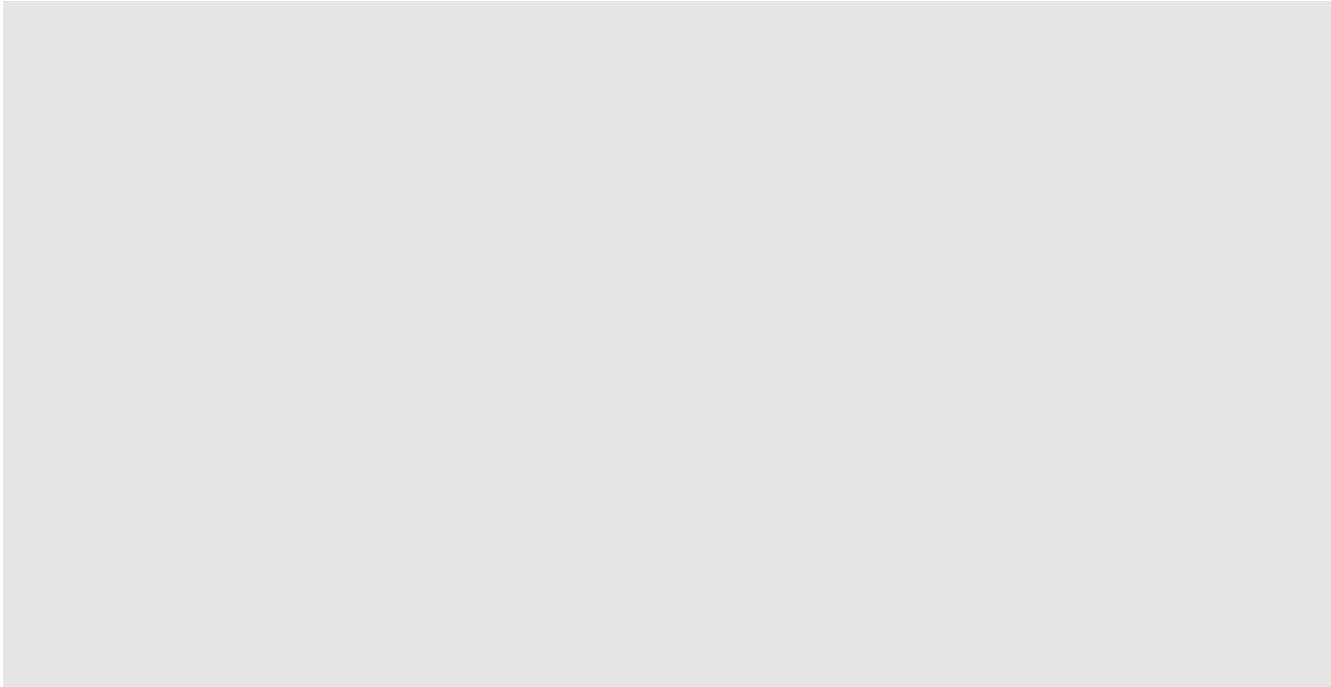
To Create Trust About Your Organization



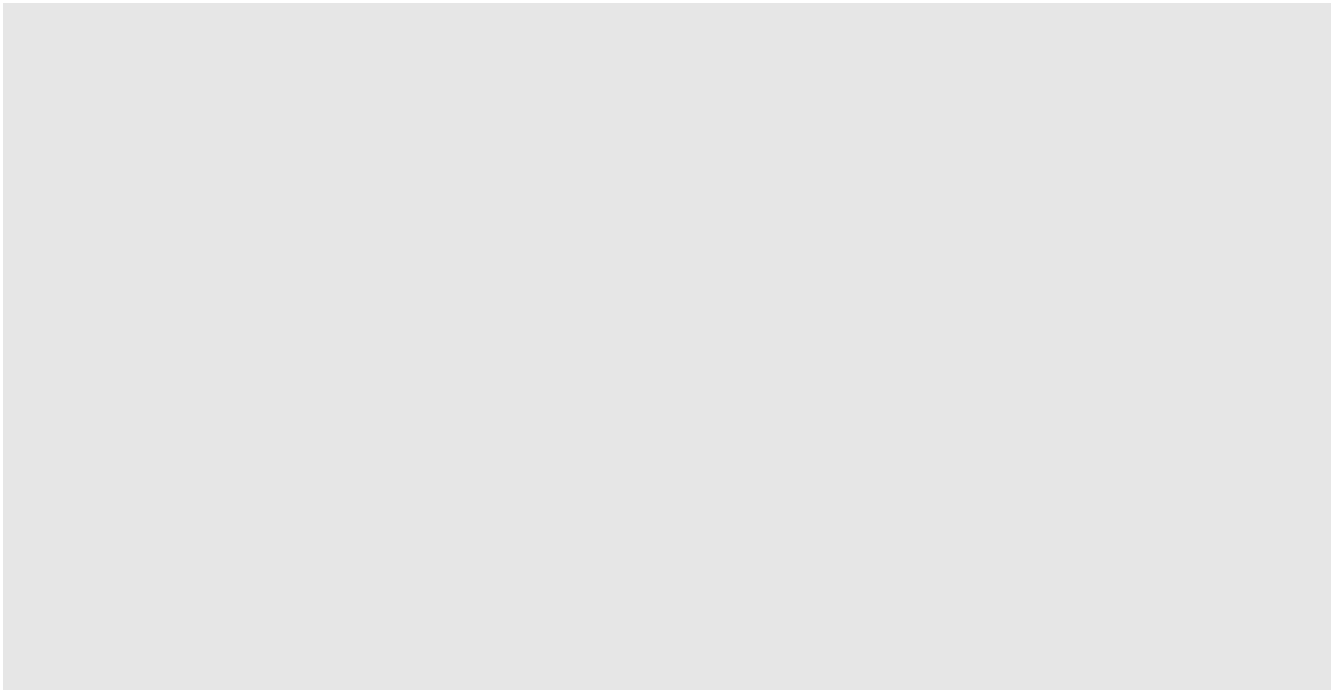
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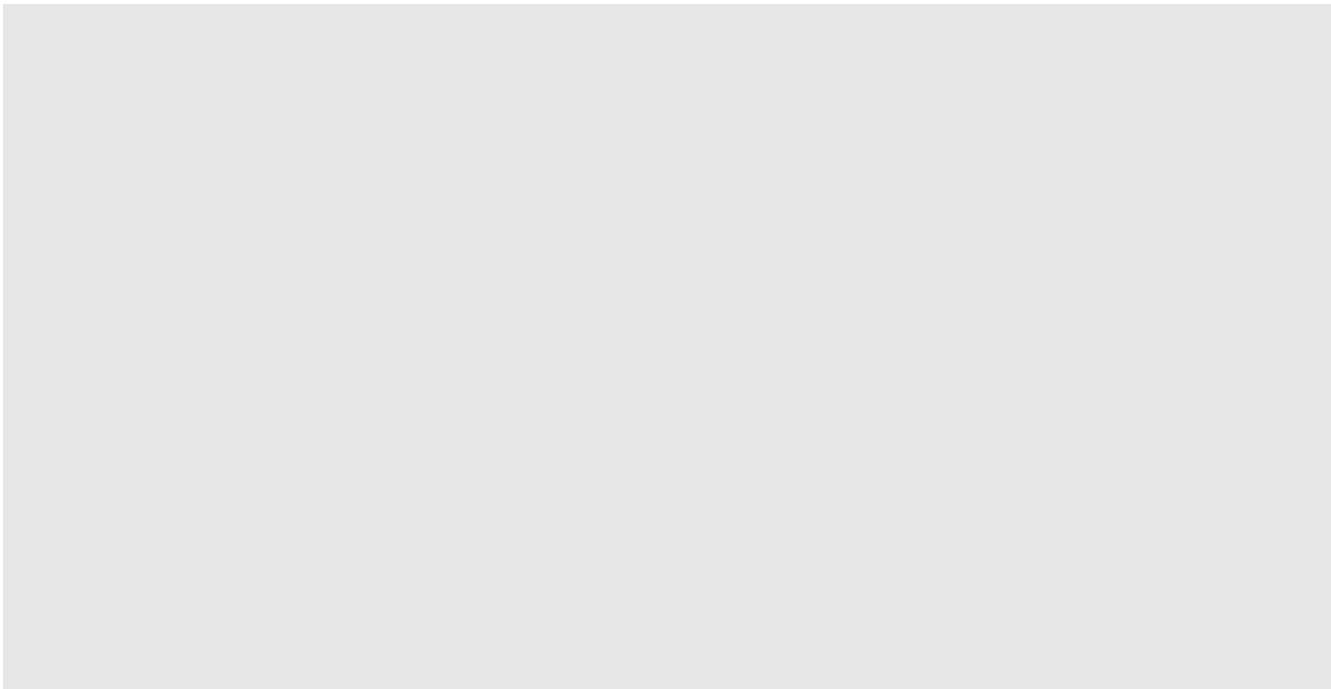
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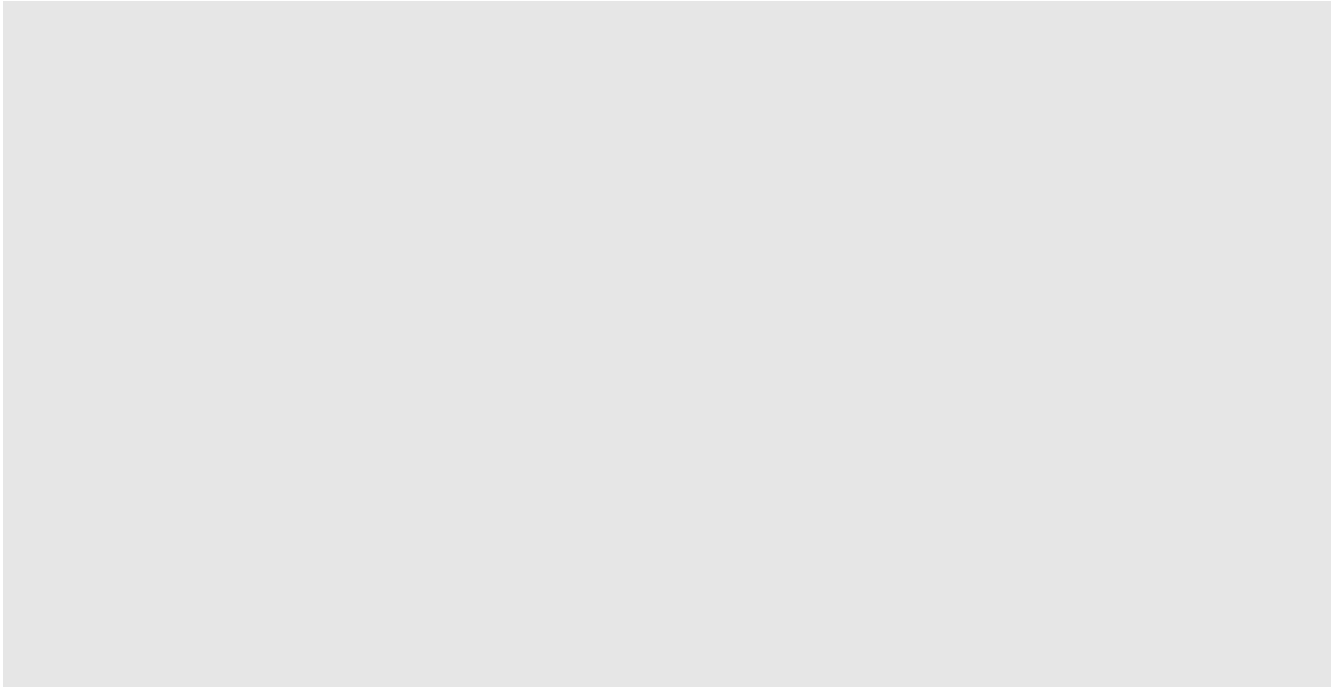
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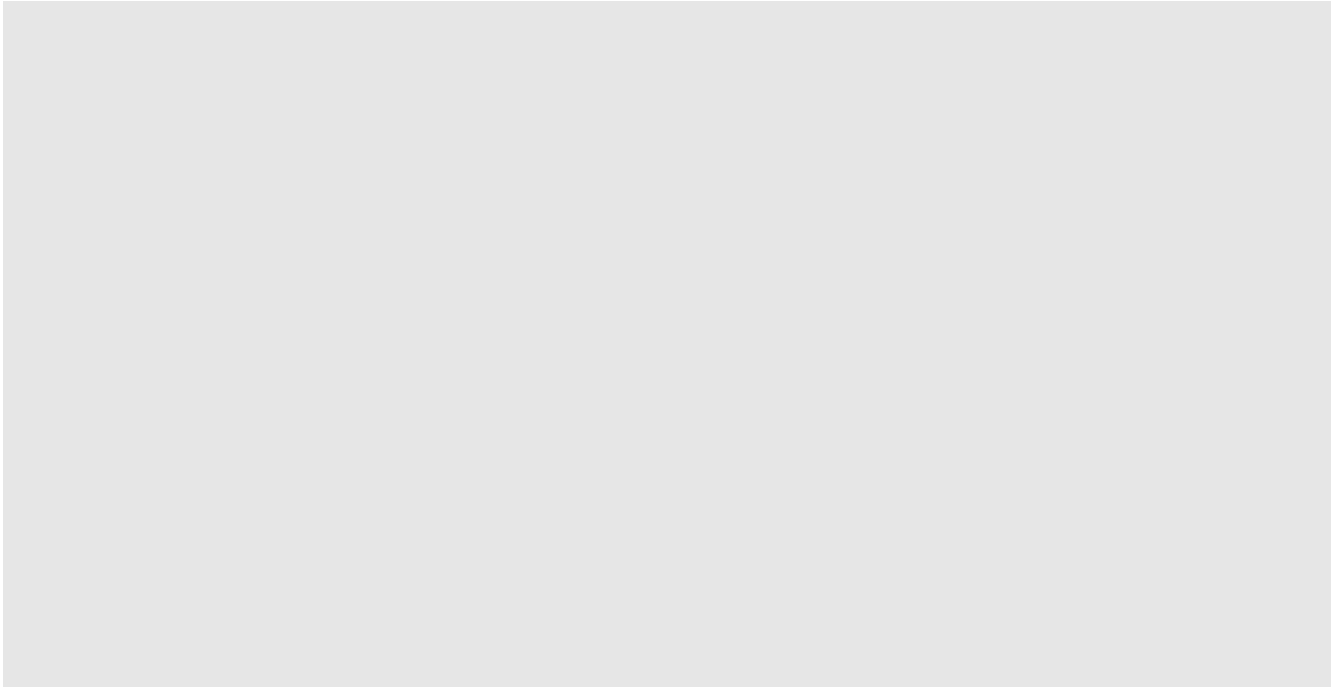
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Course Materials updated March 2025

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Experiencing The Winning Edge

Table of Content

- 1 Introduction: Positioning Yourself for Success in These Challenging Times
- 2 Goal-Setting and Taking Action
- 3 Managing Stress and Maintaining a Positive Attitude
- 4 Maintaining a High Level of Enthusiasm and Self-Confidence.
- 5 Managing Your Time and Using Technology More Effectively.
- 6 Identifying Your Best Target Markets.
- 7 Building Relationships.
- 8 Prospecting Intelligently.
- 9 Networking Intelligently.
- 10 Identifying Client's Needs – Asking the Right Questions.
- 11 Presenting Solutions and Recognizing Buying Signals
- 12 Handling Objections and Closing the Sale**





Welcome!

This course will be particularly useful to those of you who:

- Seek to improve your selling and entrepreneurial skills in order to be more successful at work.
- Want to improve ability to manage change.
- Have recently started a business and want to improve business results.
- Have been in business for a while and would like to take it to the next level.

We invite you to take the necessary time to carefully review the course document, to view the audio-visual presentations and to complete the exercises in your workbook.

Finally let us remind you that the best way to really learn the ideas that you are exposed to and that you feel are useful, is to use and apply them in your day to day activities.

We take this opportunity to wish you continued personal and professional success.

We also invite you to share this course by e-mailing it to others who can benefit from it or by providing them the address on our website to download the course.

Management Team
G.O.L.E.A.D.

Introduction

Please take a minute to view once again the following very short introductory audio-visual presentation which highlights the skills that very successful entrepreneurs and sales professionals excel at by:

[CLICKING HERE](#)

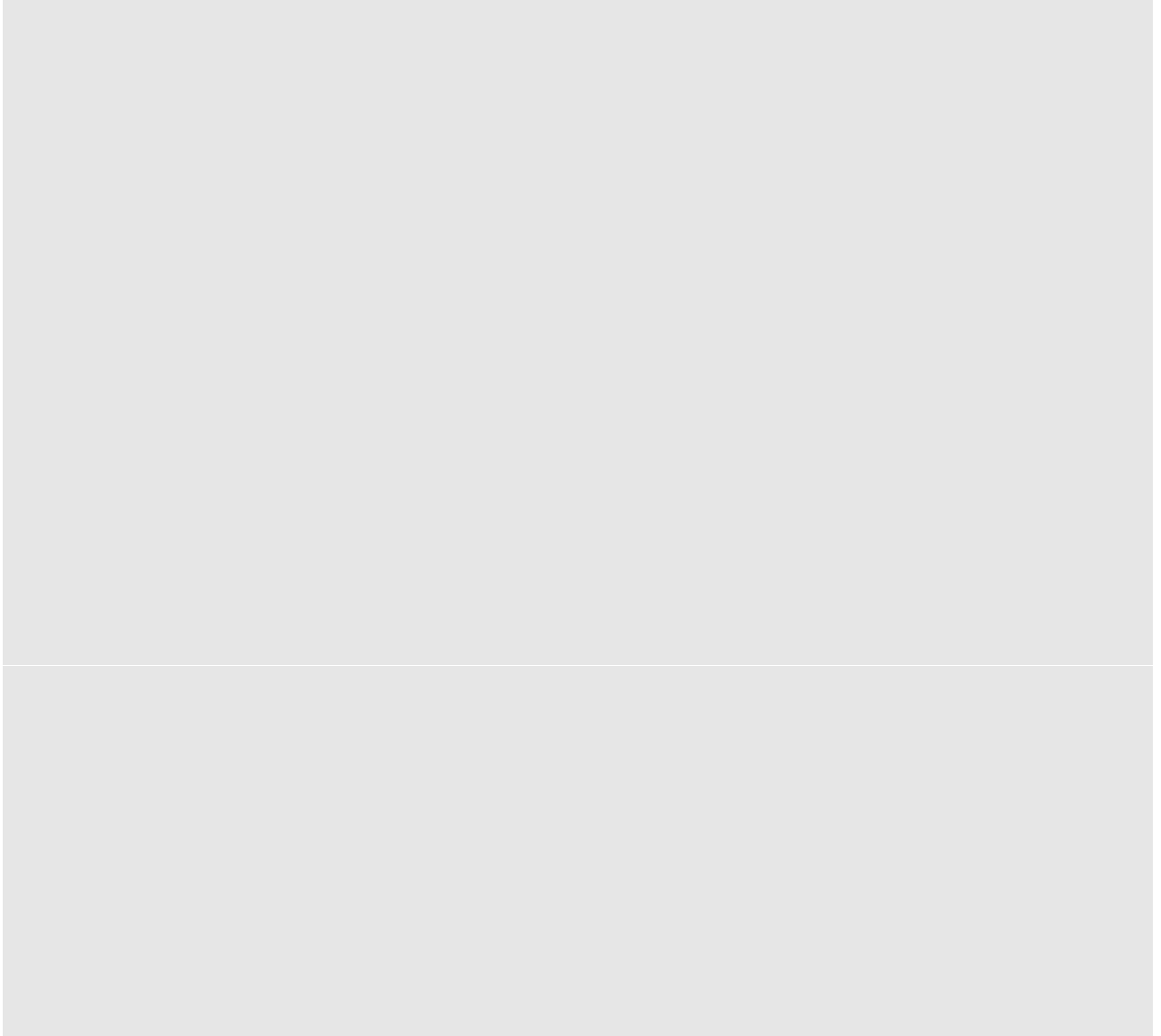
Objectives of Module Twelve:

As a result of completing this Module, you should be prepared to answer the following questions:

1. What are objections and why do we sometimes dislike them?
2. What are the six main categories of objections that we face?
3. What are some of the techniques you can use to handle objections?
4. What are the buying signals you should be looking for?
5. What are the closing techniques which you can use?

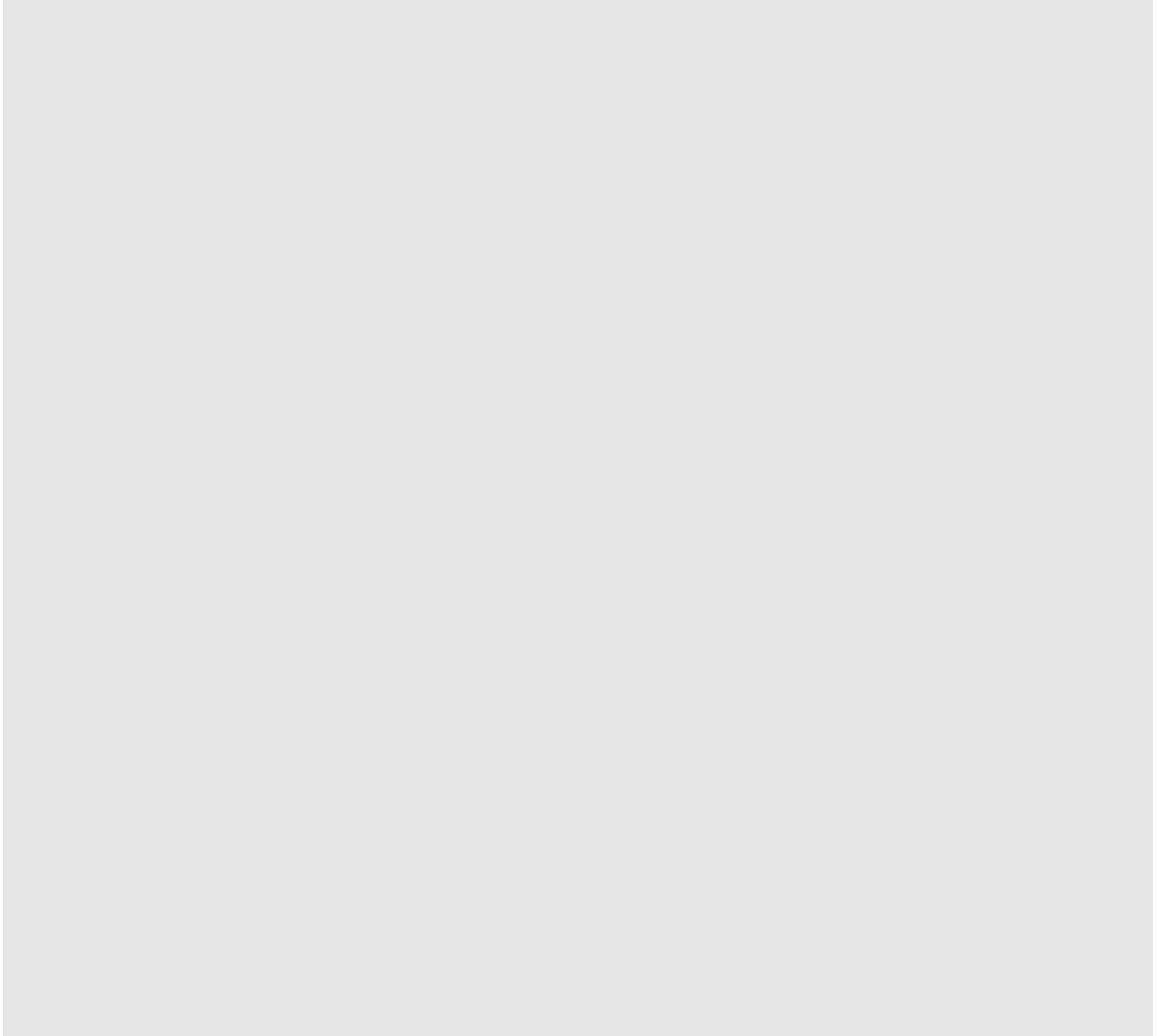
[CLICK HERE](#) to view the audio-visual presentation related to this section of the course.

Notes and Key Points to retain from this section of the course:



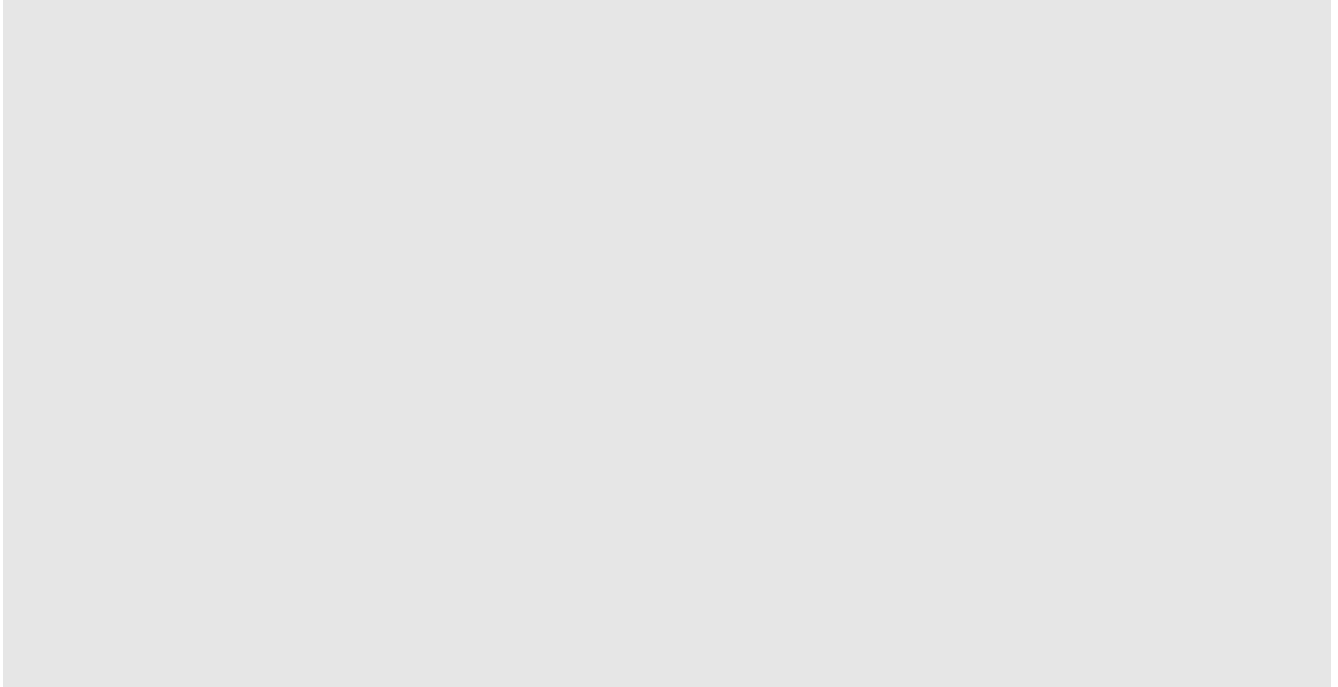
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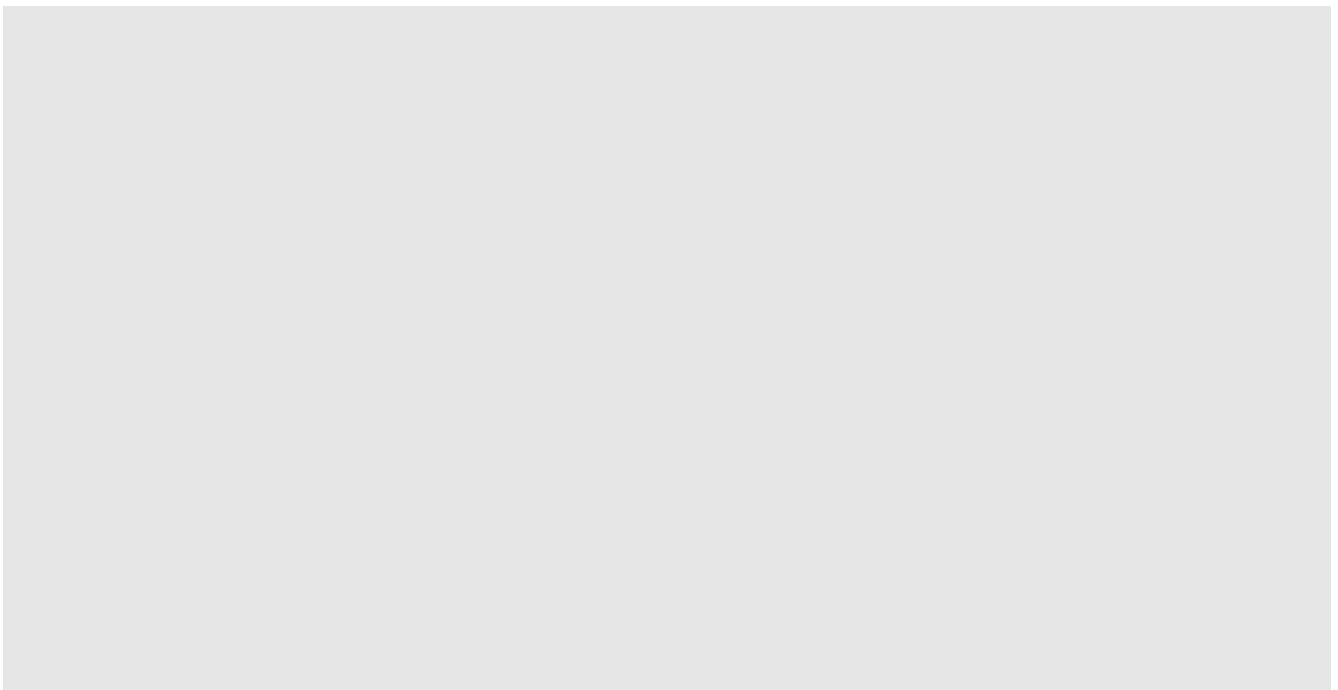


Exercise A: Typical Objections that You Need to Prepare for:

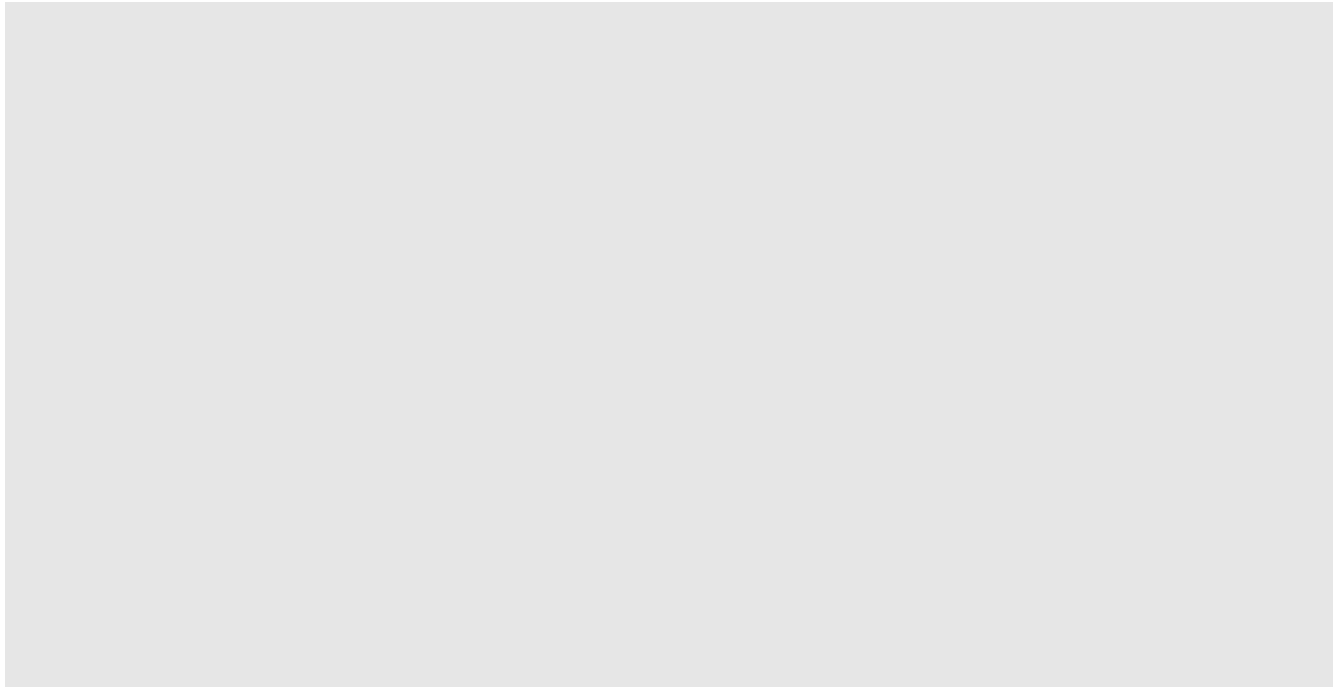
1) Products or Services Related Objections



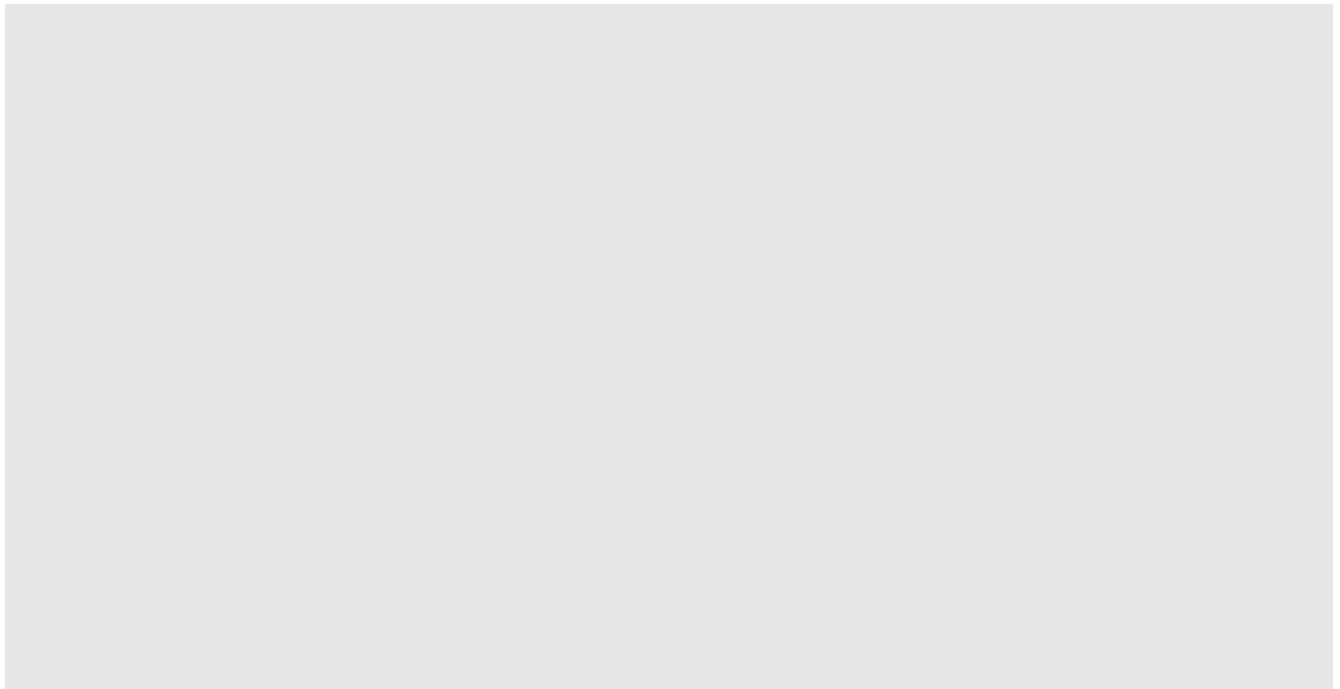
2) Ability to Deliver on the Promise Objections



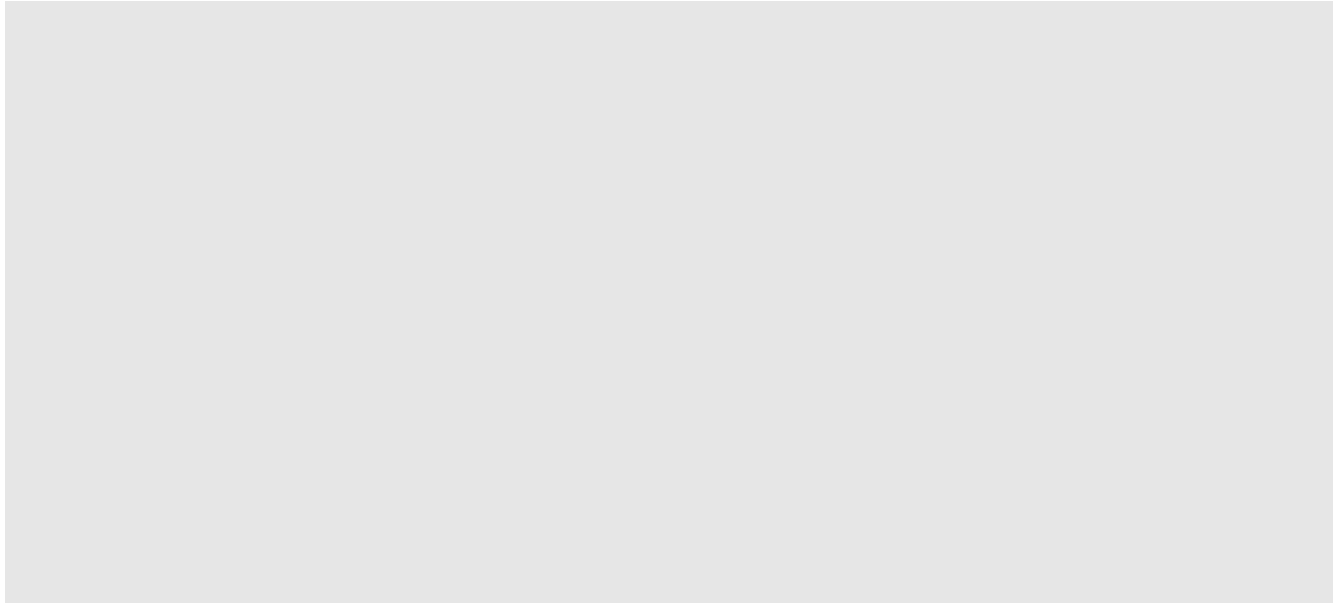
3) After Sales Support and Guarantee Objections



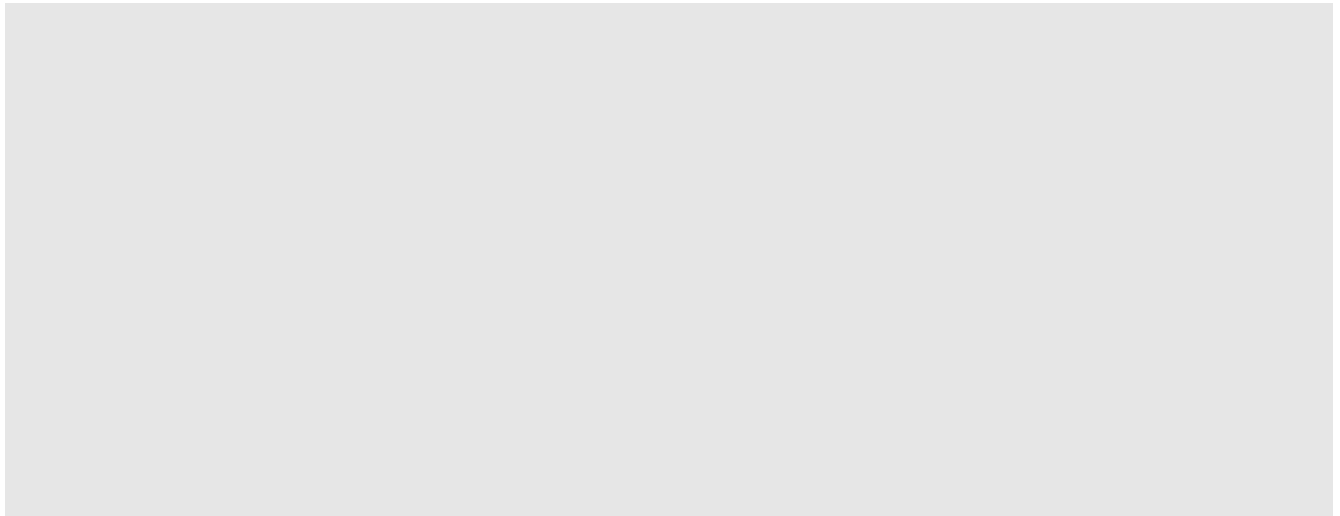
4) Competition Related Objections



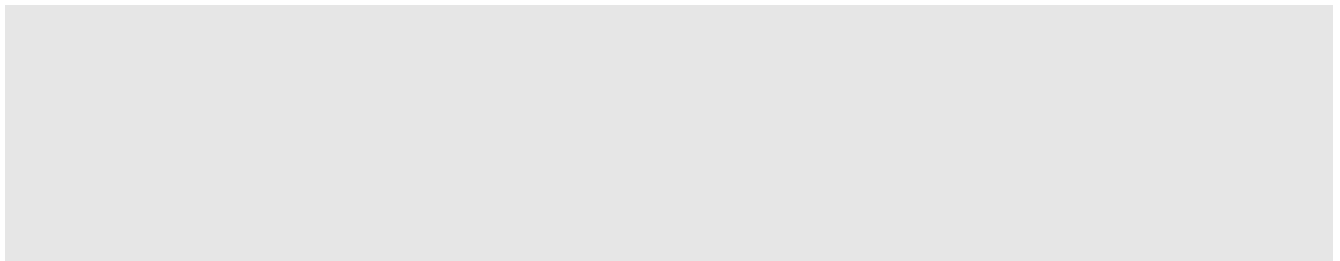
5) Pricing Related Objections



6) Decision-Making Related Objections



7) Other Objections



Exercise B – Your Answers to the Most Recurring Objections

Objection:

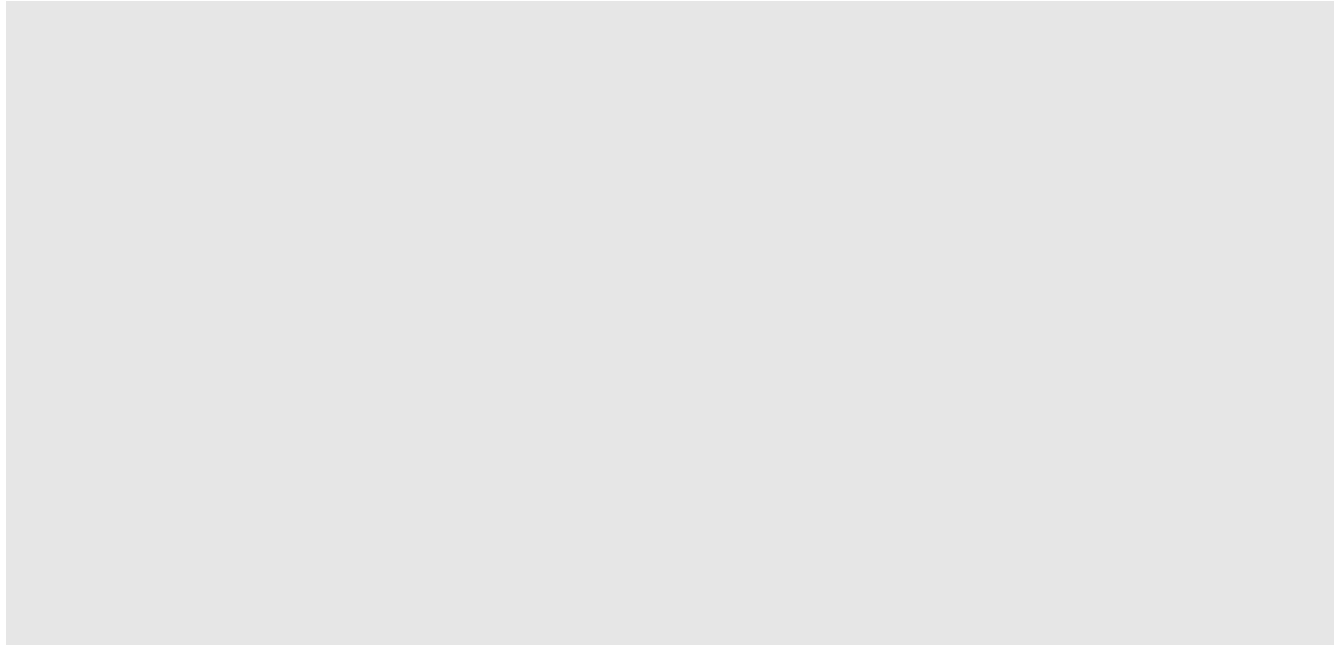
Answer:

Objection:

Answer:

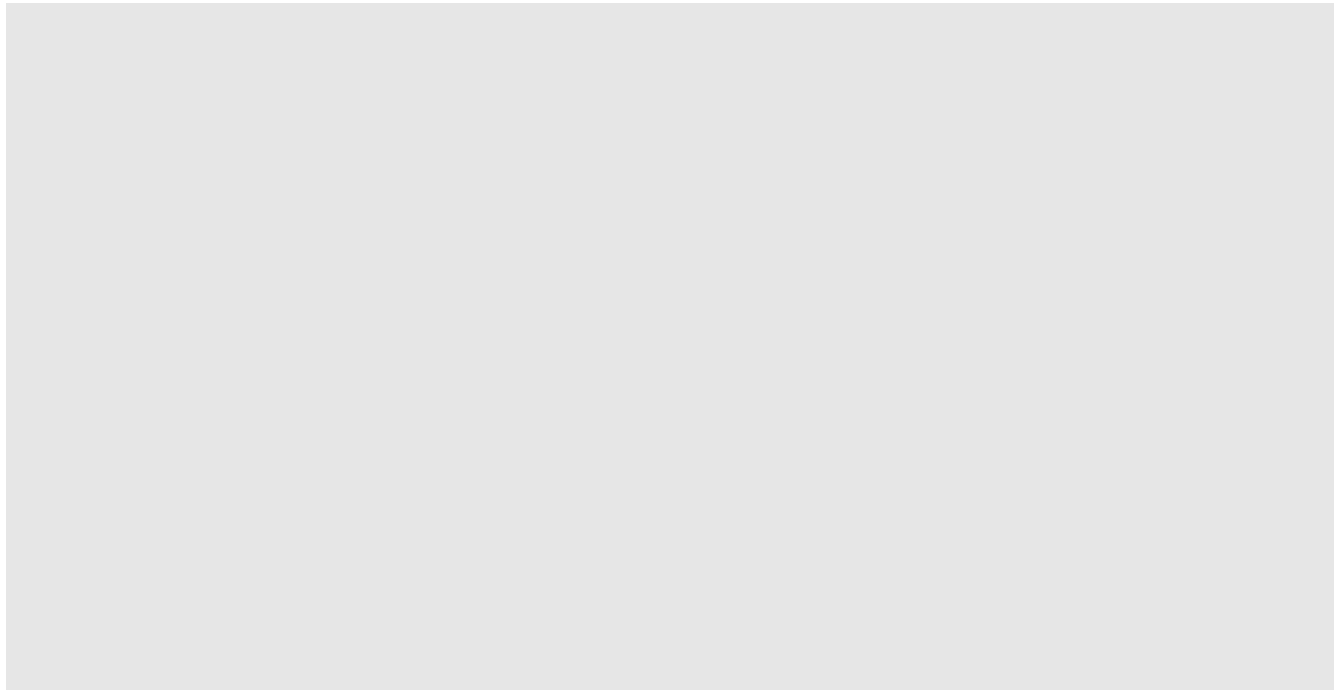
Objection:

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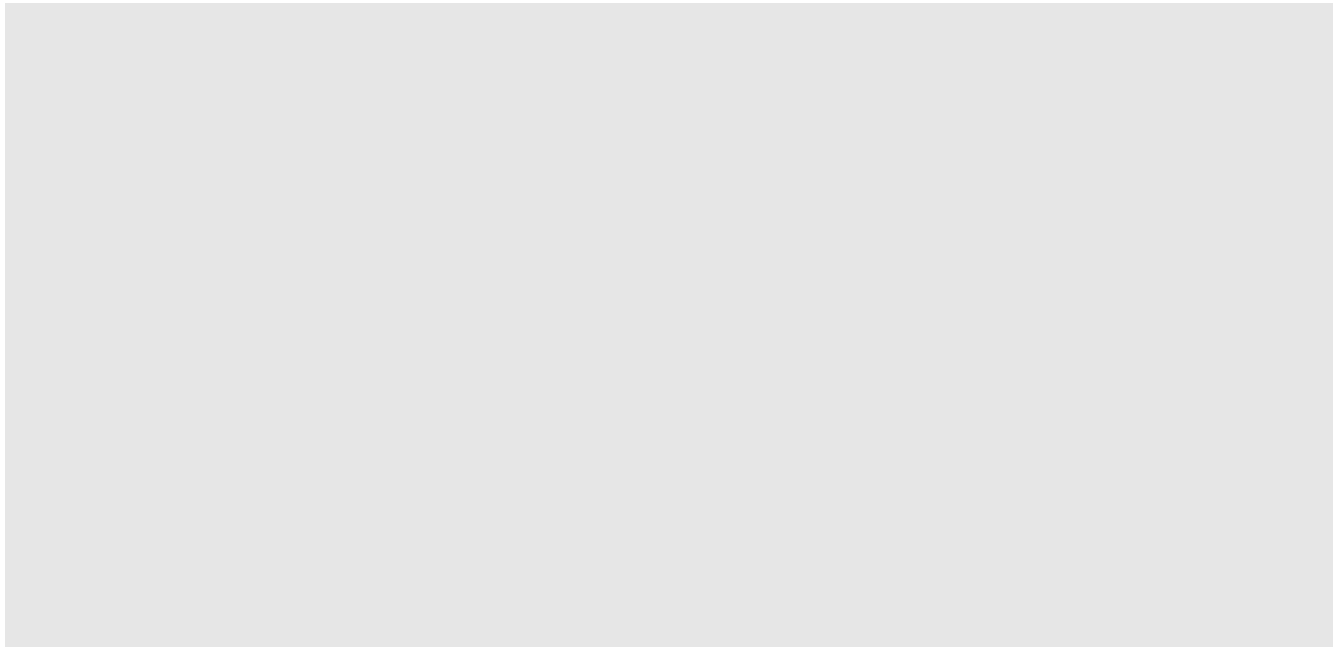
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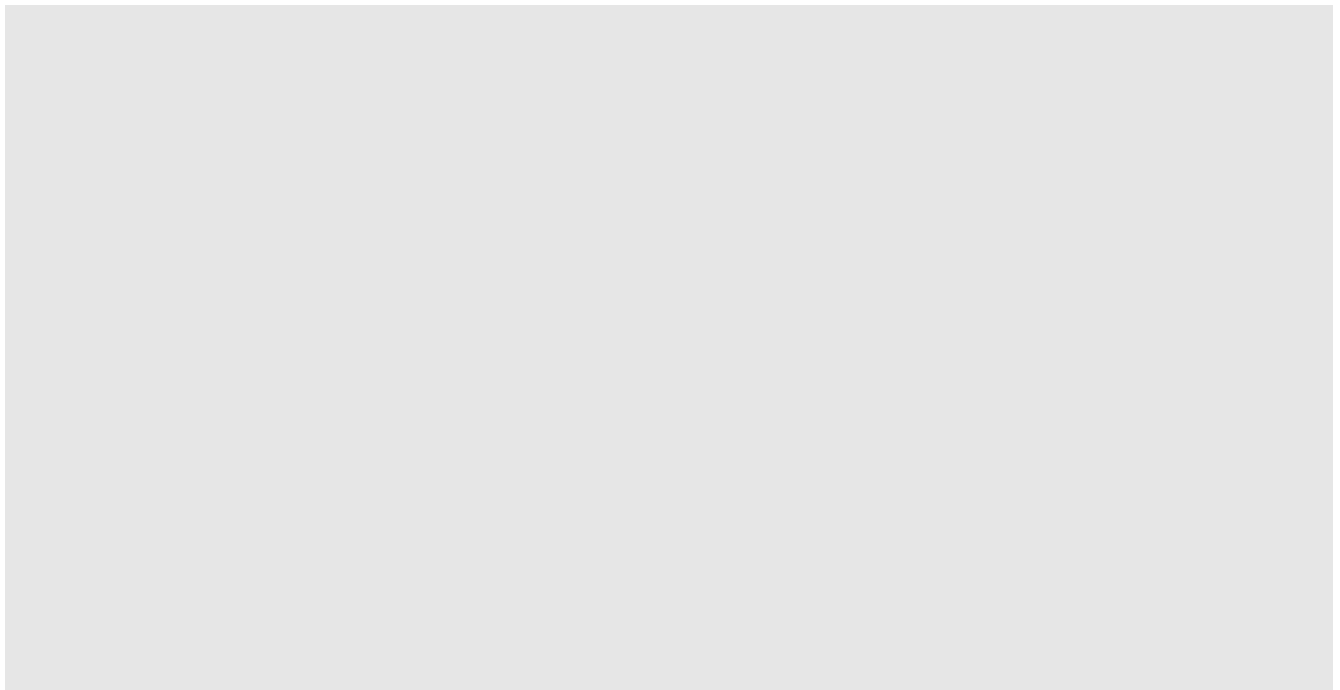
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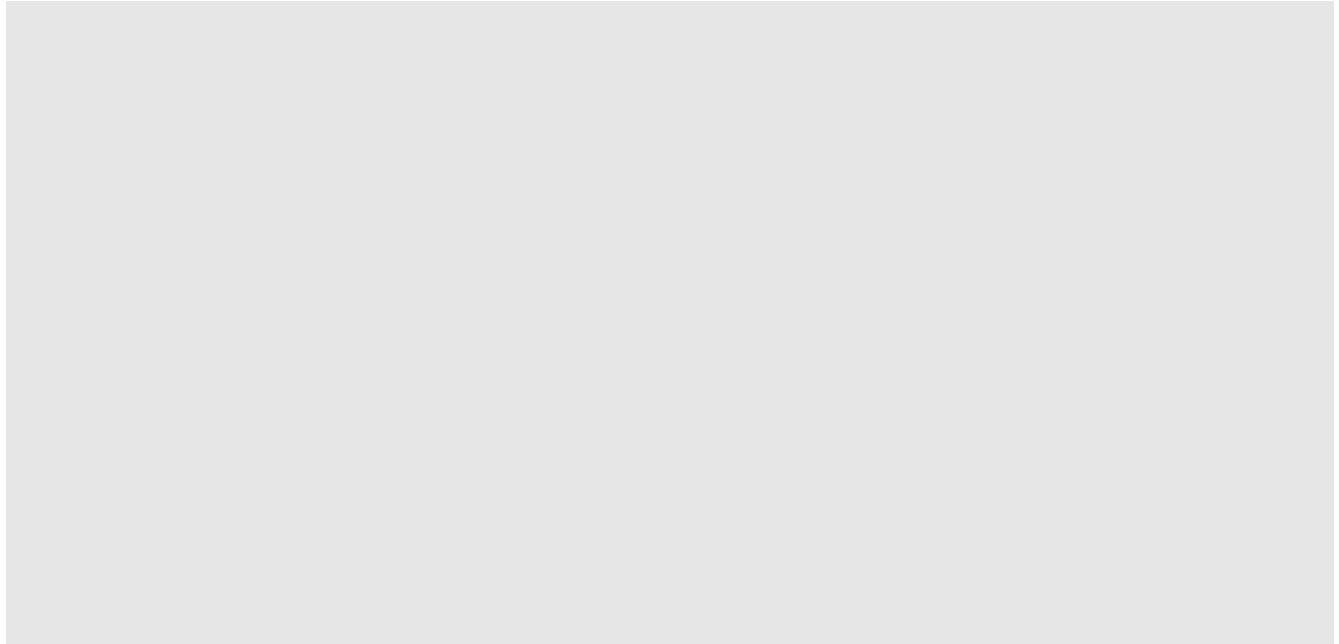
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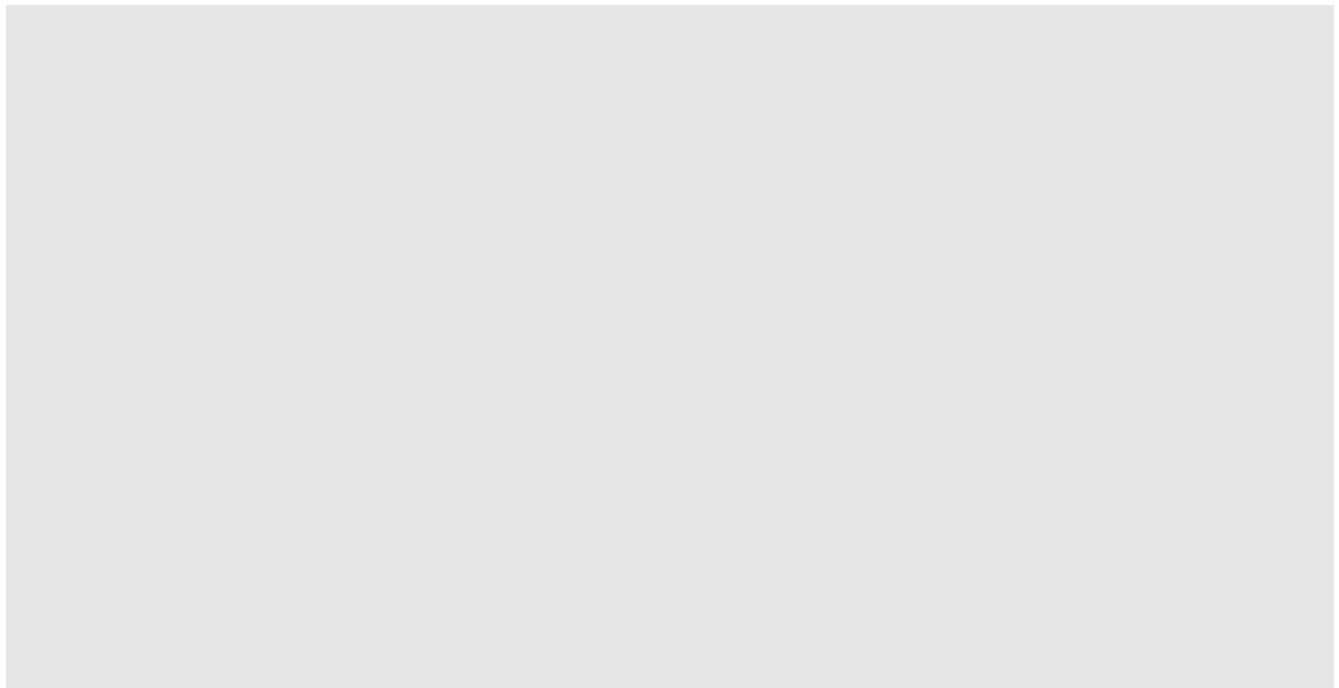
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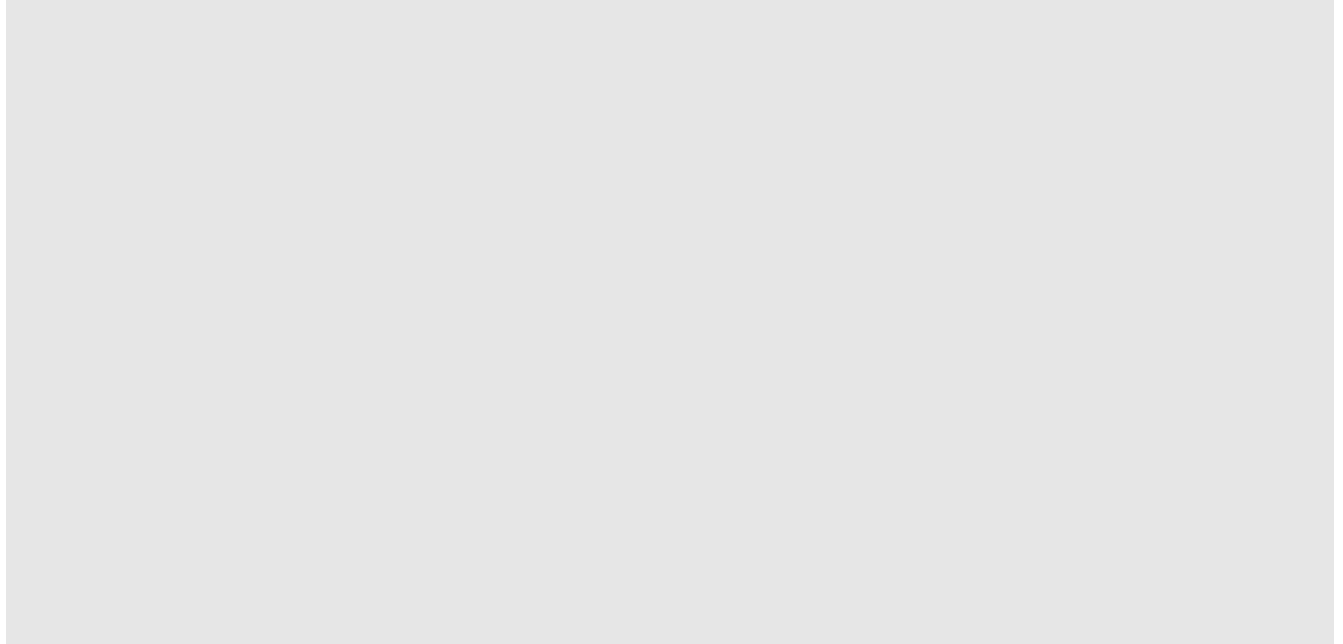
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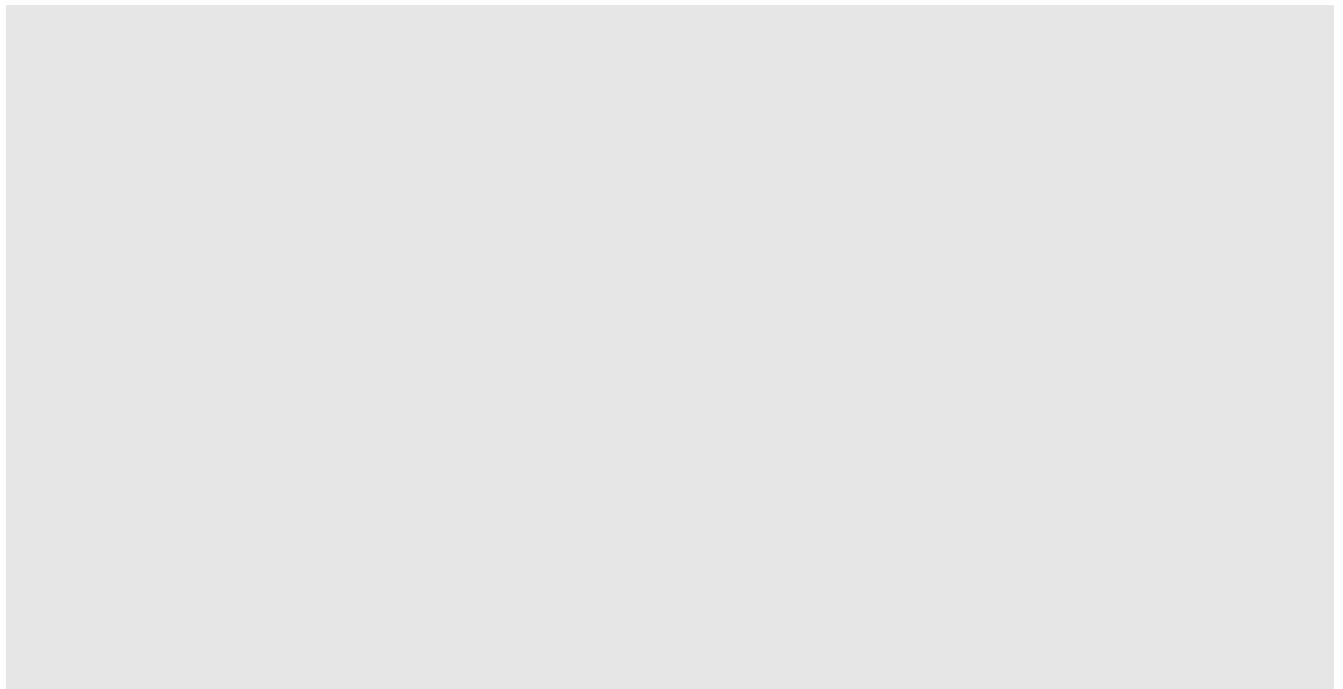
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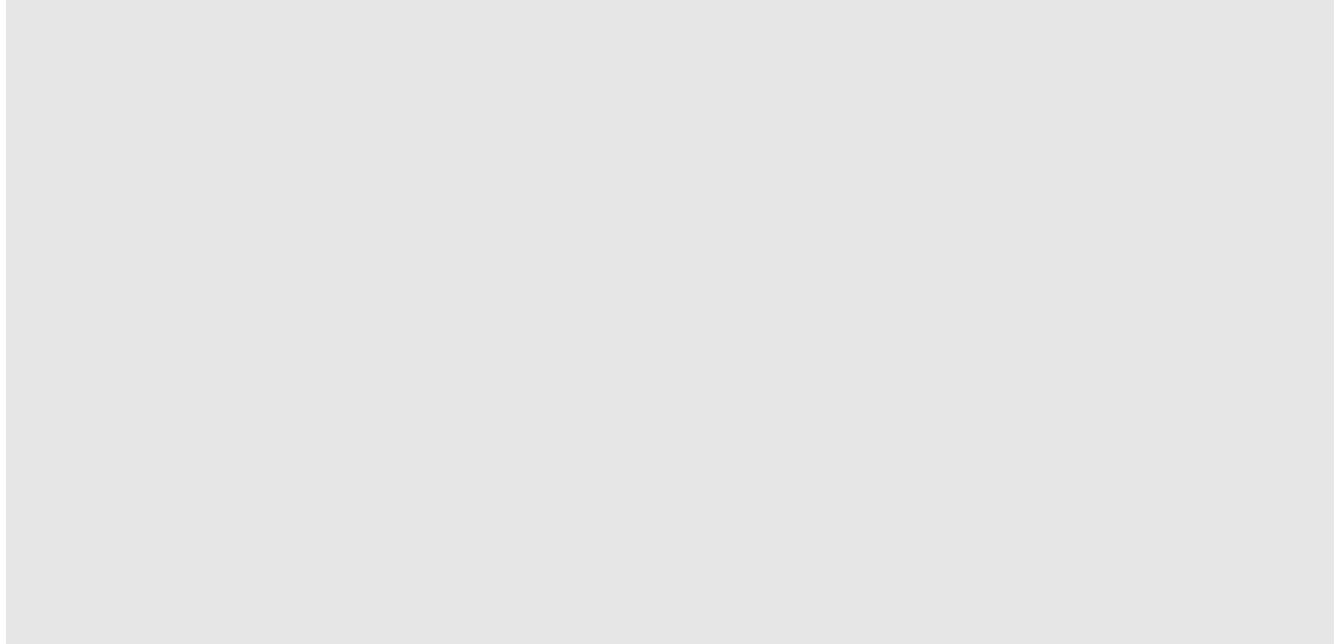
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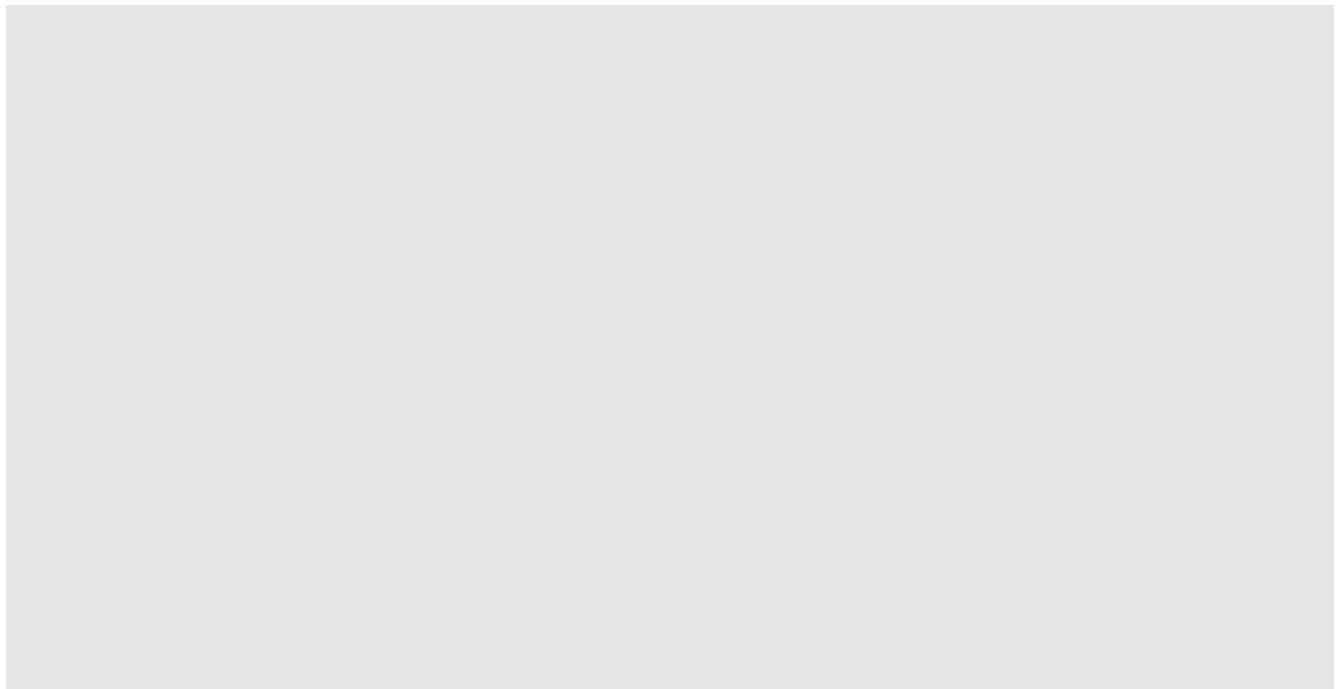
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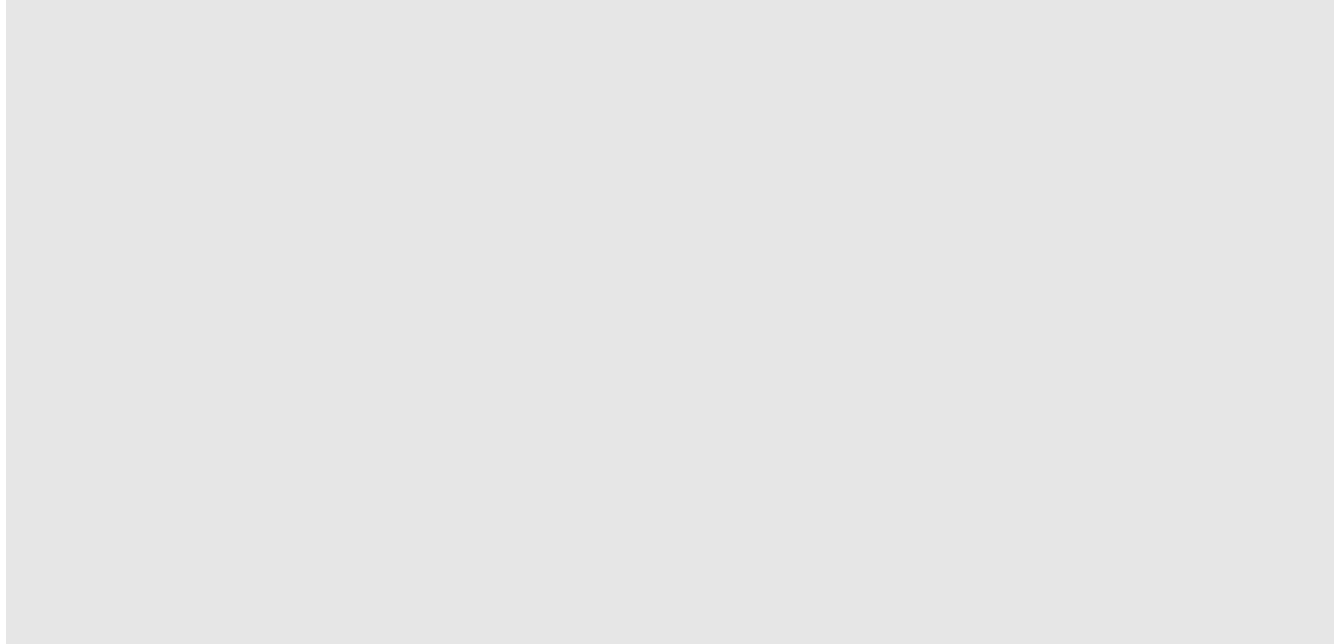
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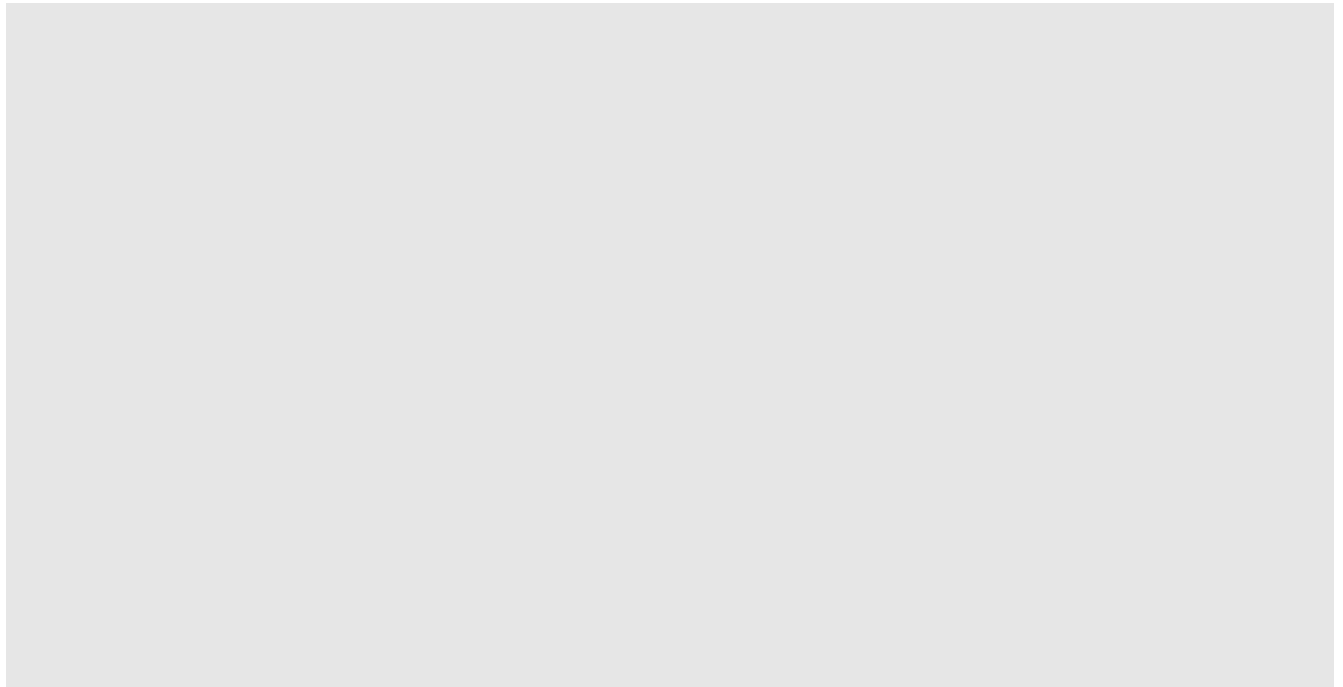
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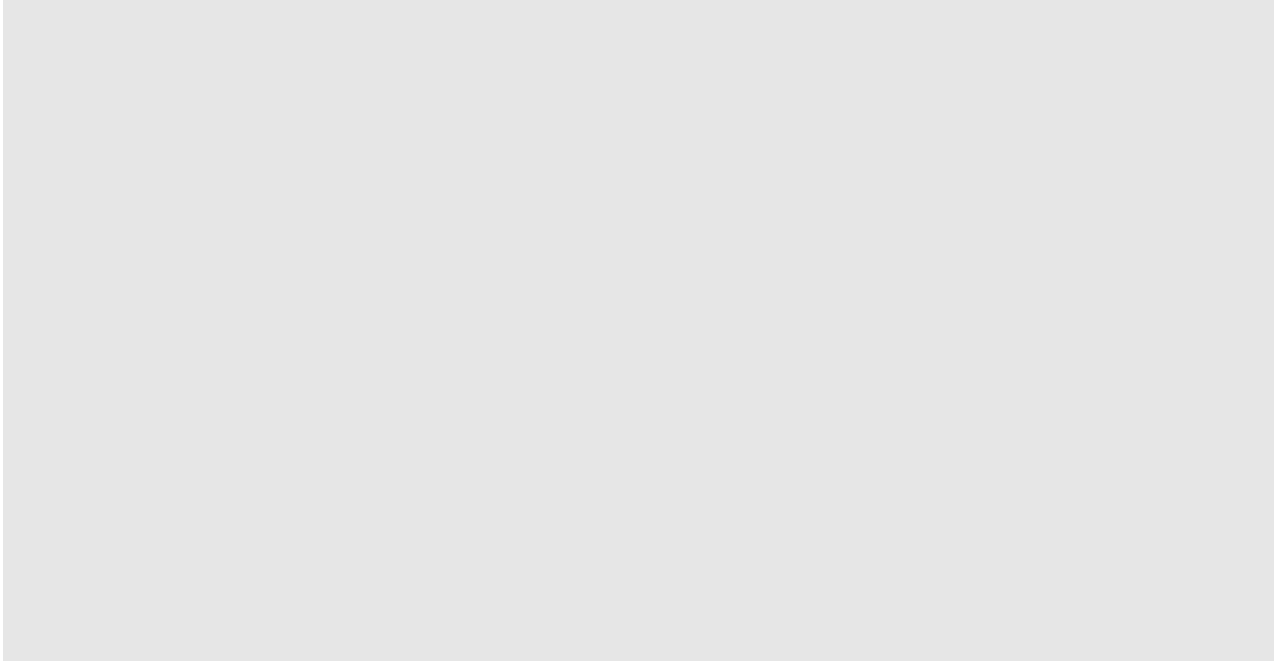
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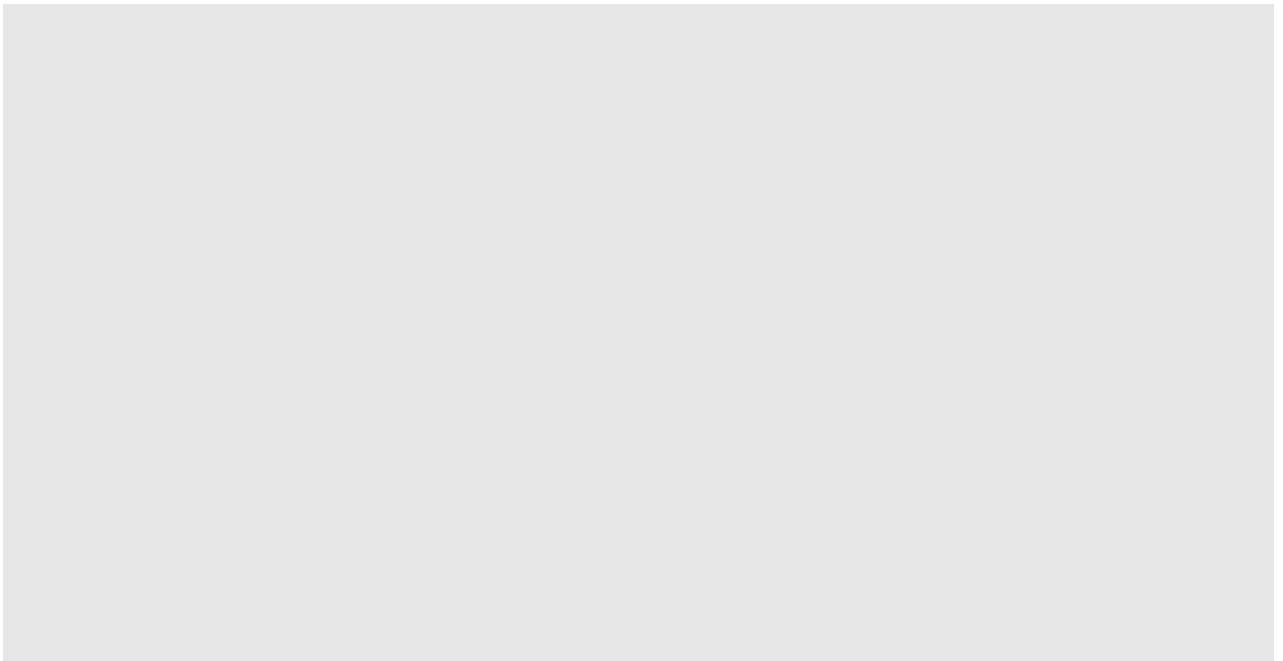
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Notes and Key Points to retain from this section of the course:



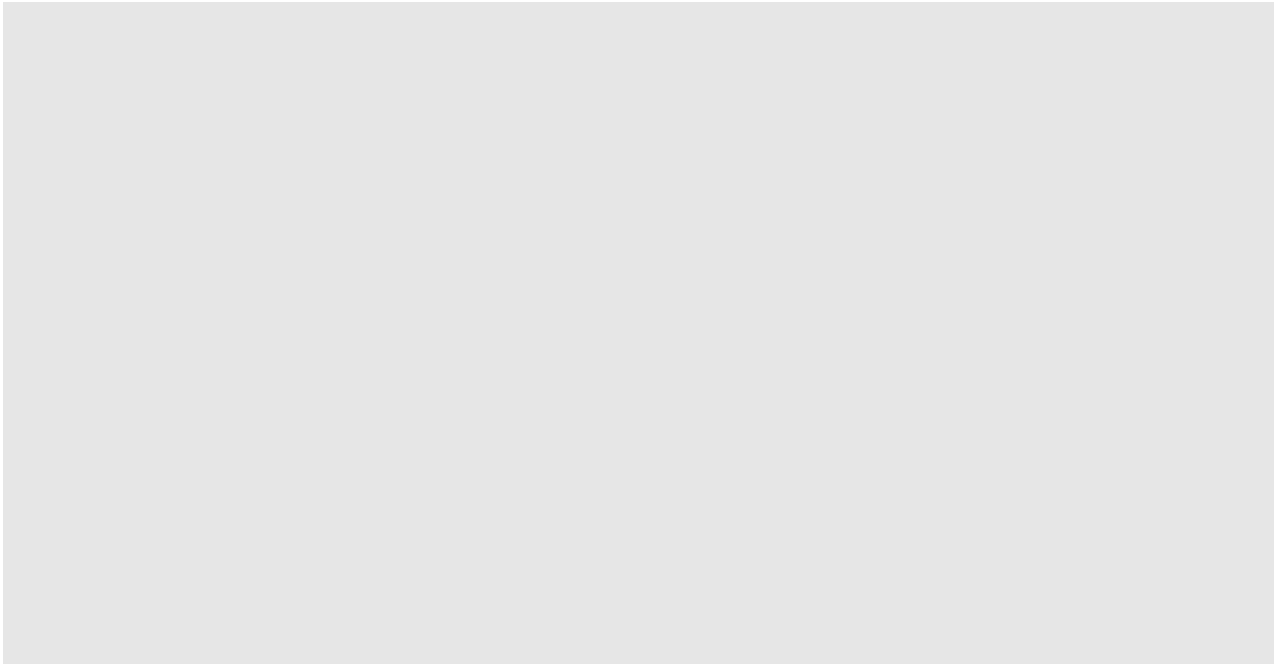
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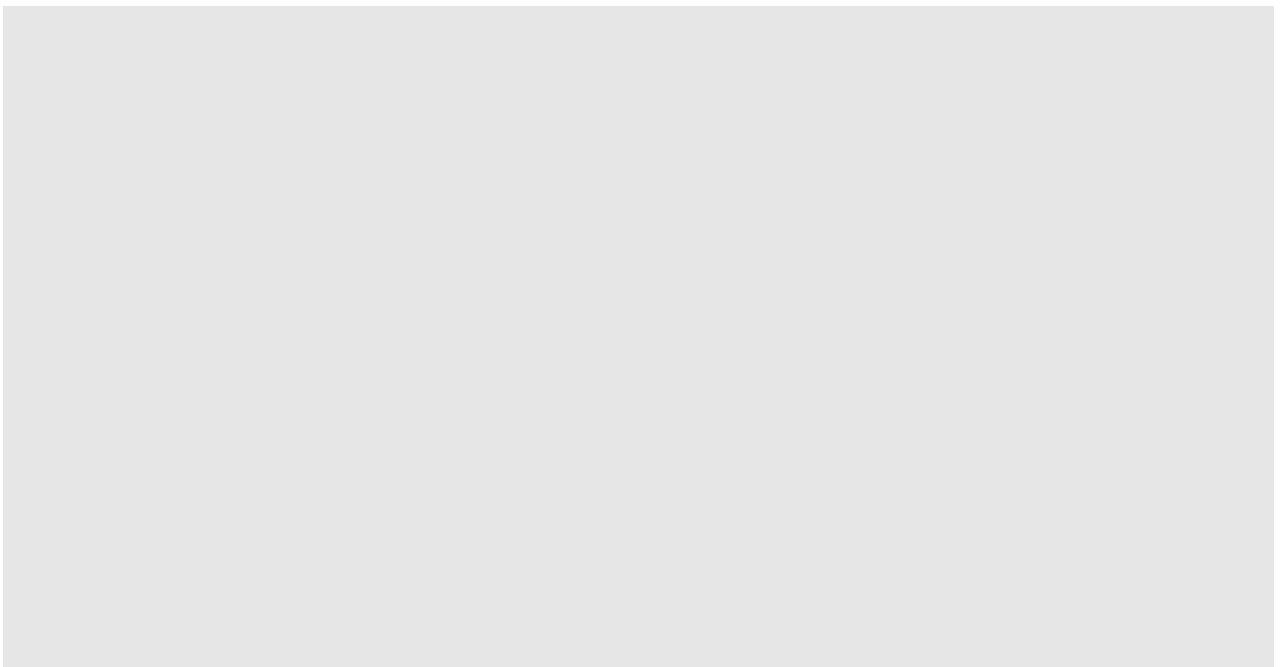
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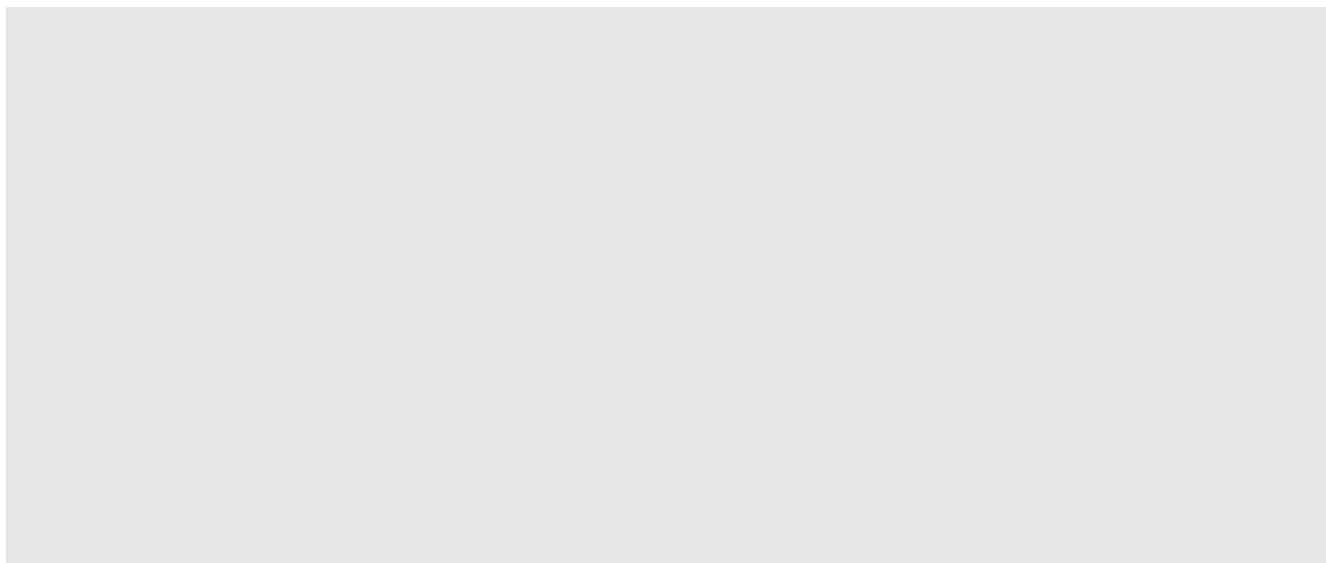
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Exercise C – Closing Techniques You Plan to Use:

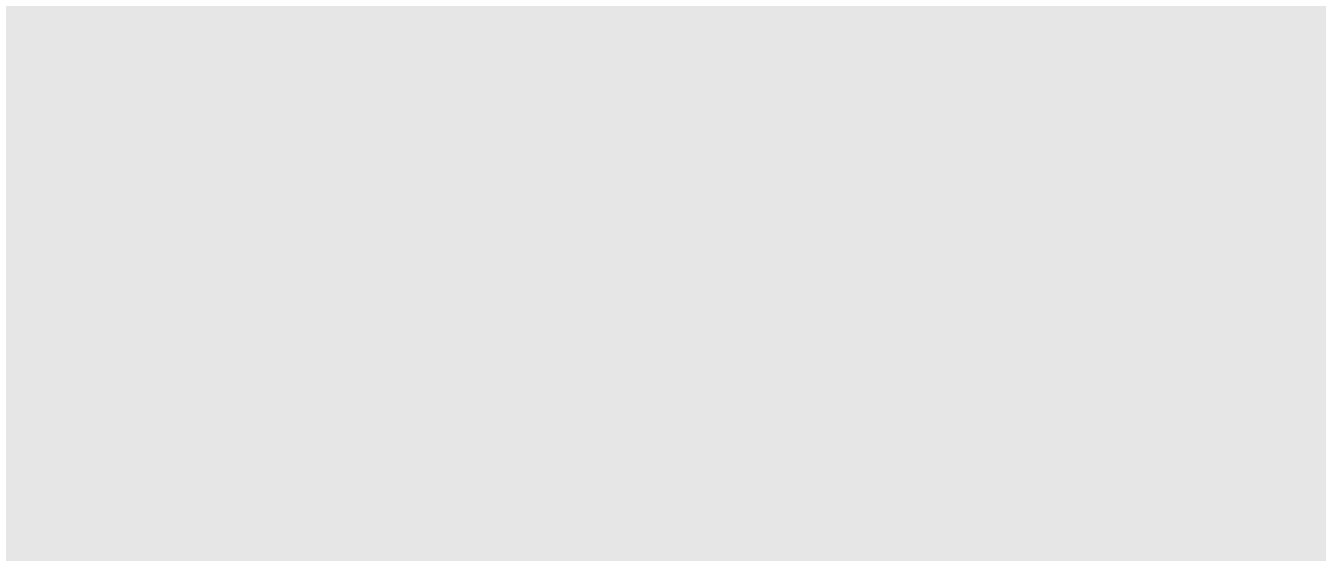
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Approach:



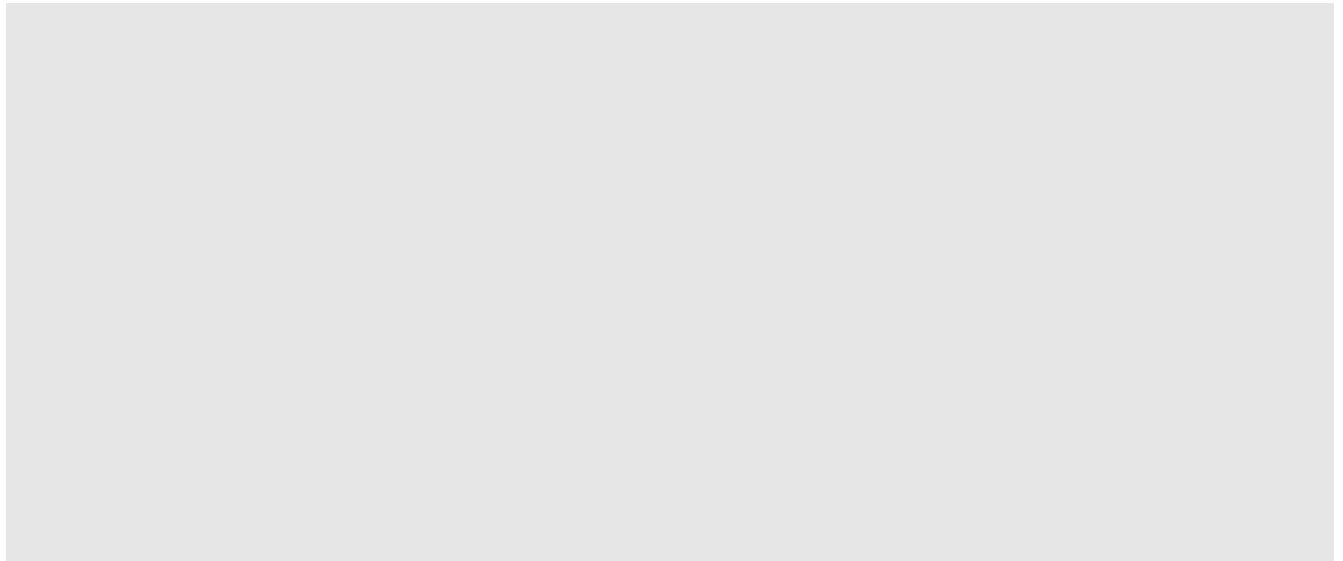
Technique:

Approach:



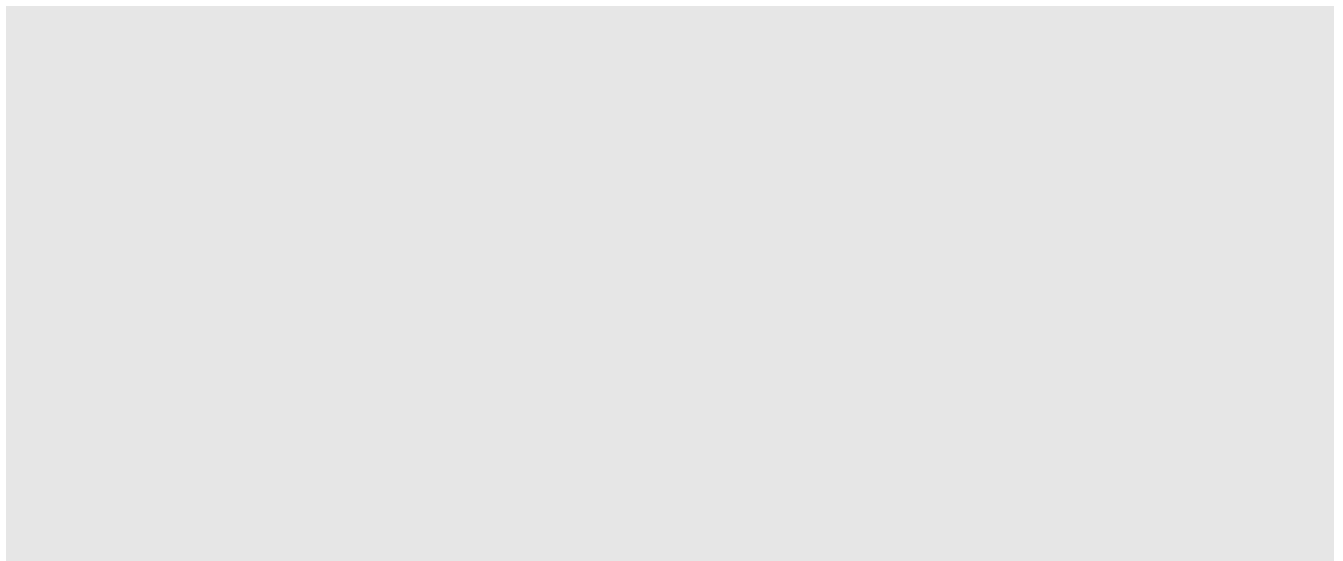
Technique:

Approach:



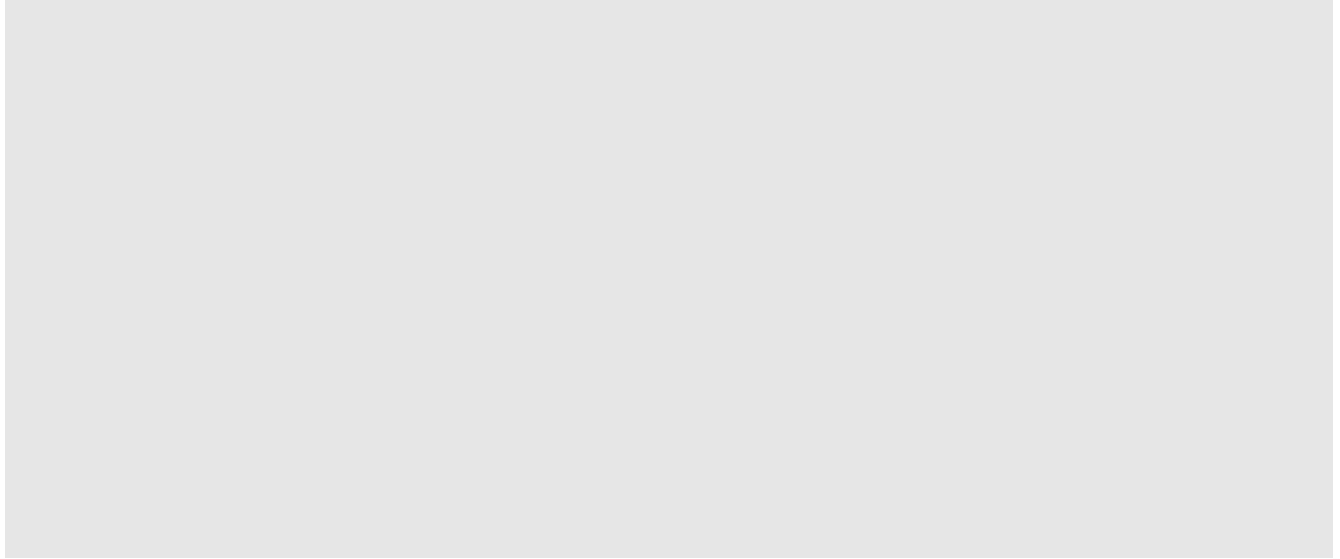
Technique:

Approach:



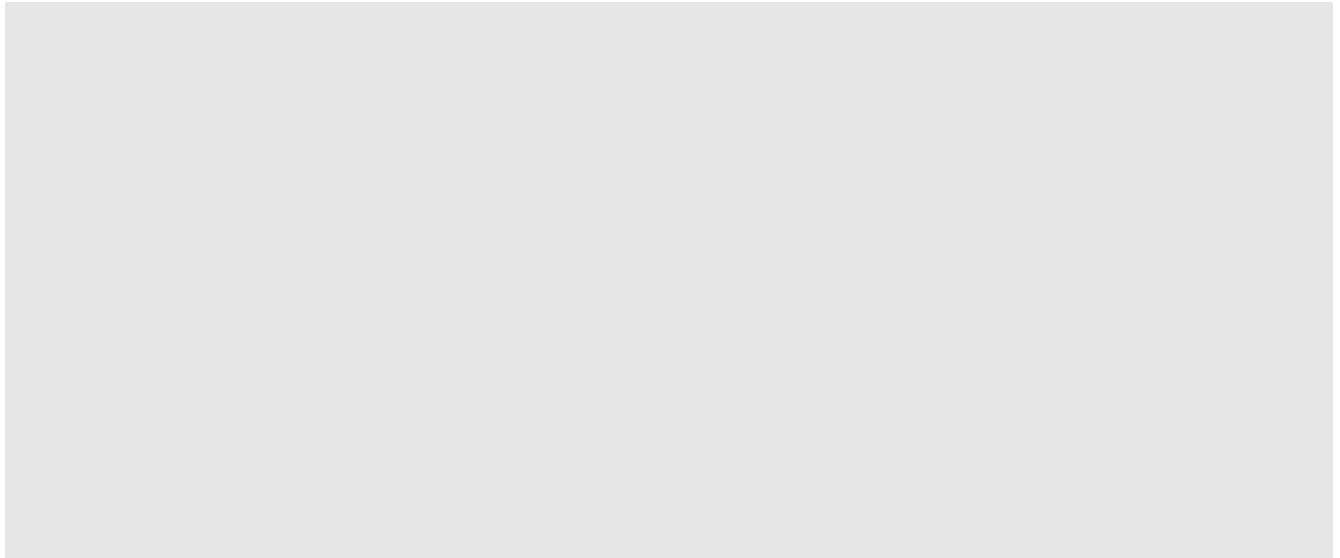
Technique:

Approach:

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Approach:

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About The Author

George Beshara

George Beshara is the author of the Leading by Managing My Life series of programs published by the Managing My Life Institute and distributed by G.O.L.E.A.D a not for profit organization based in Montreal, Canada.



As a Business Coach, George has a proven record of leading small businesses and entrepreneurs to always grow their business intelligently.

Involved in training, coaching and publishing since 1983 a few of George's accomplishments include:

- Provided business coaching solutions to a large number of clients helping them launch and maintain very successful businesses.
- Established a highly successful career transition coaching practice with corporate clients including Royal Le Page, Swiss Bank Canada, The Foresters, Employment and Immigration Canada, CIBC Wood Gundy, Ontario Government, Molson, and Eaton's among many others.
- Custom-developed training programs which were delivered nationally to a large number of corporate clients.
- Authored more than 11 Managing My Life programs which have been used with more than 100,000 individuals worldwide.
- Author of Experiencing The Winning Edge.

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