

# TOOLKIT – WORKSHEET

## TELLING IS NOT SELLING: WHAT **EHS** CAN LEARN FROM SALES LEADERS



We'll be going through the below questions during the presentation, please follow along and add your answers/introspections.



### **Current Issue/Project:**

Identify an issue you're struggling with at work right now or in the near future. Example: something you need to accomplish in the next month and will need leadership support (money, resources, time, employee engagement, etc.)

- 1. Step 1 – Discovery:** Do you know what their priorities are? What they care about? If not, jot down questions you can ask to uncover their priorities, pain points, needs.



**2. Step 2 – Solution Alignment:** what is the ROI (return on investment) for leadership on this ask/project?  
Lay out a basic business case including budgetary considerations.

**3. Step 3 – Create Urgency:** is there a deadline or clearly articulated timeline of this issue/project?  
What are the costs of delaying? What are the benefits of doing this now/soon?

Fill in this sentence: *“If we don’t rectify or do X by X, then X will occur”* or the reverse  
*“If we rectify or do X by X, then X will occur”*.

**4. Step 4 – Advancing the Sale:** how can you obtain commitment from leadership? What are your techniques and plans for follow-up?

**5. Step 5 – Get it Done:** how do you plan to demonstrate success to leadership? Set a date to complete this project.