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CASE STUDY • COLLABORATION • CONSULTING FIRM

Focus on Using Learning Preferences for Influence

Challenge

Looking to close a strategic alliance with a larger partner, the smaller firm's two representatives, Nicole and Ernest, had one last hurdle to close the deal: the CEO of their potential partner.

Nicole—a high Explore learner (and presenter)—made their case, providing ample context for the business proposition. While Nicole was going over these details, however, Ernest noticed that the CEO was increasingly showing signs of being disengaged: looking around the room, tapping his fingers on the table, etc. In fact, Ernest realized, the more that Nicole talked about "context," the more disengaged the CEO became—he was mentally checked out.

This deal was crucial for the smaller firm to move forward; Ernest had to keep the meeting from going sideways. He looked down and saw the CEO's Learning Preferences report peeking out from a stack of other papers.

Action

Ernest skimmed over the "Learning Keys" section of the Learning Preferences report and glanced again at the CEO's Energy Map as he quickly formulated a plan.

Interrupting, Ernest leaned into the CEO and summed up their proposal, "Here's what we want… Here are the terms we're talking about… Here's when it would start… What do you think?"

CEO's Energy Map

Results

The CEO's face lit up and he responded, "Fabulous! That's great—you've got a deal." Within one minute of his interruption, Ernest had closed the deal.

Ernest successfully used Learning Preferences to re-engage and influence the CEO based on his highest Energies, for a mutually beneficial outcome.