## **Discover Workshop-Overview**

**Discover Workshop** is an event-based product where a CoreValue Advisor can conduct Discover with a group of business owners and executives, and pool the results of all participants.

**Getting Started:**

To host a Discover Workshop, your CoreValue Agency needs to be provisioned to allow a group configuration of Discover. You will be provided with a unique code which, when implemented, will segment the group and aggregate user results anonymously. Discover functions the same for each participant; the programming allows the Advisor to share the group’s results immediately in a variety of formats.

The Workshop includes access to CoreValue Analytics™ providing the workshop facilitator the ability to present the group’s results in an aggregated and anonymous format.

Each user receives a personalized confidential Discover report, delivered immediately (on screen) following the Q&A, with an email copy to follow. Results for the group allow each participant to compare their individual results with those of the group, as well as other businesses selected for comparison, without having to divulge confidential or proprietary information.

**Requirements**

* Business executives who attend will need to bring a laptop or tablet to participate, and have a clear understanding of their most recent Revenue & profit numbers, as these are required to properly calculate Discover results.
* CoreValue recommends no more than 20 seats for a Discover workshop. This will allow you to better manage the discussion that inevitably ensues during the process.
* You will also need a projector to show the questions to the group and facilitate the Discover process.
* Verify that your selected location has adequate internet access to accommodate your audience. Be sure to inquire about the feasibility of having 20+ users online simultaneously before you book your venue. Slow internet connections can cause lag time which may lead to incomplete reports.
* Individual ‘timekeeper’ to keep the meeting moving on schedule.
* CoreValue recommends that facilitators are well-versed in 18 Driver framework, methodology and common questions about the drivers.
* CoreValue requires a minimum of two-weeks’ notice to prepare, test and provision your Workshop, and to conduct your training on CoreValue Analytics.

**Other Considerations**

A workshop is designed primarily as a marketing event for you to promote your business using the CoreValue methodology. You may wish to charge a nominal fee ($50 or less) to participants. This is a great way to ensure the folks who show up are serious about learning how to make improvements and grow their business. Refreshments are a must if you are charging for attendance, however, you’ll want to keep food and beverage selections light – the focus is on building more valuable businesses, not a full meal. Schedule your event in-between common meal times, e.g., 9-12 noon, or 2-5pm. Encourage networking among the participants by adding some ‘down time’ to your agenda – this also allows you to review the analytics prior to presenting results to the group.

**Have a focus or theme**

Tie the event’s theme to your firm’s expertise. Are you looking for clients who want to accelerate the growth of their business? Perhaps you’re branching out to consult with owners looking to sell? Do you want to reach business owners who have a general interest in building a stronger company? Or perhaps the participants would simply like to take a vacation without worrying about their business falling apart when they leave. If you don’t have a pre-determined theme, or you’re offering the workshop to a diverse group, poll your participants before you begin to determine what they want for themselves and their business. Write it down. This will help you to answer questions appropriately and address their needs as you explain the results.

**Have a plan for “next steps”**

It’s nice to get a free Operational Value Report but what else can your audience expect? What action steps should they take to address their results? Will you offer a free follow-up consultation? Perhaps your firm may offer a driver-specific workshop, based on todays’ results? Whatever you decide, be sure to articulate to your participants what your firm is available to do for them post-Discover.

**PRACTICE YOUR DELIVERY!**

CoreValue provides you with a PowerPoint presentation to assist in delivering the Discover Workshop. Carve out some time ahead of your event to practice the delivery of this presentation. Add your branding to the slides. Prepare your speaker notes, and practice using the slides several times until you are comfortable with the presentation flow. Check in with your venue at least one or two days prior to the workshop to be sure they have everything set and ready to go.

**Conduct a Survey**

Before you break for the day, ask your audience to complete a short survey on their experience. CoreValue provides a standard one-page Workshop Survey form, or you can use your own. This demonstrates both your attention to detail and your firm’s commitment to quality and continuous improvement. And it allows for private feedback from the participants which you may not normally encounter during the program itself.

**Follow up**

Everyone who attends should receive either a courtesy ‘thank you’ email or phone call. This is your chance to speak directly to the business owner, one-on-one, to offer additional insights into their Discover results, answer questions they may not have wanted to ask in a public forum, and elicit feedback on their experience. It’s also a secondary opportunity to discuss the Unlock Deep-Dive analysis with a more personalized approach.