MAP Study Paper 3

Welcome to your third Mechanics and Practice Study. This program is reserved for those members of Influence Ecology who have successfully completed the Fundamentals of Transaction program, or other prerequisite study, and participation is by invitation only.

This program is a study in the fundamental science and practice of transacting powerfully in the marketplace.

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Study

If you have not committed yourself to the deliberate practice of study according to the recommendations we made in your first study paper, please take some time to review the opening section of Study One, entitled 'Orientation to Influence Ecology Programs and Mechanics and Practice.'

Materials Required

We will inform you of any materials, books, or other purchases you will need to make in advance of assigning them for study. Materials you will need to acquire will be posted in **Bold Orange Print**.

The following books are required for this study:

Influence – Science and Practice by Robert Cialdini

Spark – The Revolutionary New Science of Exercise The Brain by John J. Ratey, MD

Your Brain at Work – Strategies for Overcoming Distraction, Regaining Focus, and Working Smarter All Day Long by David Rock

Study Worksheets

Study Papers will include Worksheets. Please download and save the Study Worksheets that accompany each Study Paper and follow the *Submission Instructions* outlined in the Worksheet.

The Thirteen Steps

The continuing work you must do on the Thirteen Steps to Building Your Primary Transaction will evolve and expand with each Study. In this Study, you will expand your work on the Transaction for Invitation and Presentation by concentrating on Inventing Transactions for Invitation and Presentation.

Each move and phase is in and of itself its own transaction. Every Invitation is a transaction that requires the same consideration of the Thirteen Steps as with any transaction. Your understanding and ability to apply the Thirteen Steps will be demonstrated throughout the program as you become more and more related to the fact that we are always transacting and all transactions are built on the same fundamentals.

The Conditions of Transaction

The FOT Program introduced three fundamental models designed to assist in the embodiment of complex systems - the *Conditions of Life*; the unavoidable and immutable conditions each of us are transacting to satisfy – the *Transaction Cycle*; the series of moves made in every transaction – and *The Thirteen Steps*; a means to think accurately about the architecture of a satisfactory primary transaction.

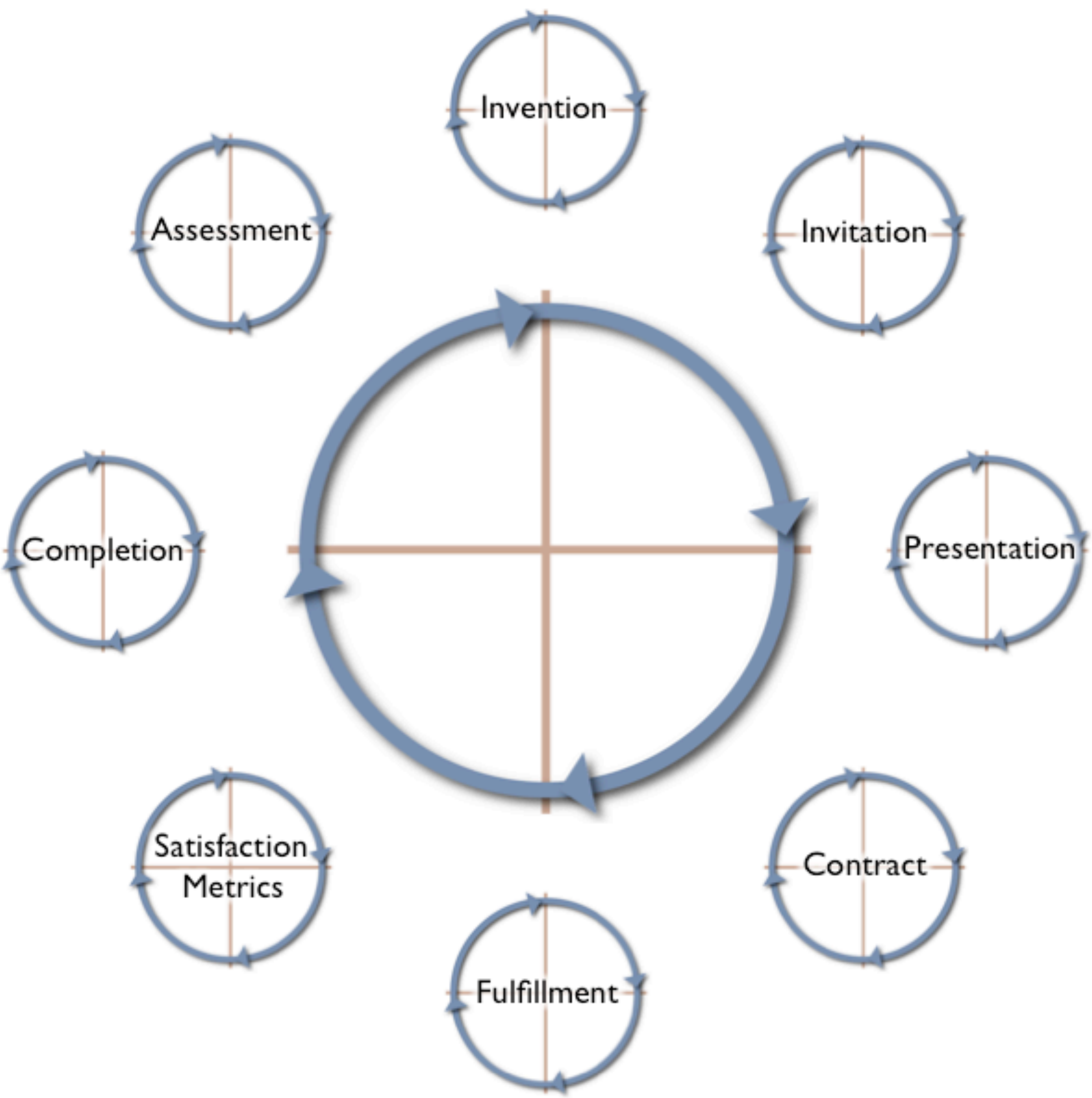
We will now correlate these by introducing *The Conditions of Transaction*; the unavoidable and immutable *Conditions of Transaction* that satisfy a primary transaction. **The revelation here is that each move in the transaction cycle is itself a transaction cycle.**

This program's focus is the mechanics of each Condition of Transaction (see diagram below).

We began in MAP Study 2 with the 'Condition of Transaction: Invitation' and with each Study Paper we will move clockwise around the Transaction Cycle. As an example, the articulation of the Condition of Transaction: Invitation for your own offer, will assist you in the:

Invitation of the Invitation
Presentation of the Invitation
Contract of the Invitation
Fulfillment of the Invitation
Satisfaction Metrics of the Invitation
Completion of the Invitation
Assessment of the Invitation and
(Re)invention of the Invitation

Each Condition of Transaction will influence your thirteen steps and vice-versa. Each Study will influence, build and focus your entire offer over the next year and for many years to come.



BUILDING THE TRANSACTION FOR INVITATION AND PRESENTATION

In your previous study you began the work to build the transaction for Invitation and Presentation using the Thirteen Steps. In this Study you will have the opportunity to expand your thinking and planning in the Invention of your Invitations and Presentations (Step Eight).

The worksheets will guide your thinking and planning as you consider the Invention of Invitations and Presentations as transactions themselves.

With the work that you have done and will continue to do on your Primary Transaction, you will begin to recognize new ways of thinking about how to apply what you are learning in order to increase the quality, quantity and speed of each move and phase in the transaction.

The following are intended to inspire your concern and sensitivity about transacting in the marketplace at a much higher level than you do now. Some of you will have specialized knowledge that goes far beyond what we recommend in some areas, and others will recognize that this introduction to certain distinctions, principles and disciplines is insufficient for your current aims, and you will need to seek additional specialized knowledge.

Use this Study and the Worksheet to inform your thinking subjectively and to help you produce the articulation required to move objectively. This is your study – make it your own.

INVENTING INVITATIONS

An Invitation is a form of an offer that is extended to a *specific customer* where the result is the acceptance or the decline to hear (attend/receive) a formal Presentation.

INVITATION PRESENTATION

An Invitation is a form of an offer, which means, an invitation must be Presented. The Invitation Presentation is generally intended only to gain the compliance of the qualified prospect to attend, hear or receive (agree to, Contract for) a formal Presentation of the Primary Transaction.

We recommend that you design and craft an Invitation Presentation in the form of a script for the most common situations where your Invitations will be made to *specific customers*. These scripts are the Presentations you are likely to make and will serve many purposes over time.

Depending on the nature of your business, it is likely that you will need several versions of your Invitation Presentation. The key elements of your offer should be consistent, as in the work you are doing in your 13 Steps, or with the 22 Immutable Laws of Marketing, for example. But you will need versions that take into account the type of prospect you are speaking to, their familiarity with you, your enterprise, or your offer.

Enterprises that are in the infancy stage of development may not have a broad base of potential customers to call on and will need to Invent their Invitation Presentations for one type of customer, where other highly established enterprises dealing with a well qualified inventory of leads will take a different approach.

There are thousands of sales trainings, books, seminars, programs, etc. that cover the world of prospecting, pitching and the like, for almost every industry in the marketplace. We recommend that if your duties, or your role in the enterprise is specifically in the area of marketing, lead generation or sales, you look to gain specialized knowledge that will serve you in your effectiveness.

Depending on your offer, you may need to create, design and practice many versions of Invitations from one-liners (elevator pitches) to more elaborate and multi-dimensional Presentations.

Generally speaking, however, you should have no less than three Invitation Presentations invented and ready to Present. We classify these as Cold, Warm and Hot Invitations.

Cold Invitation: Cold Call, Cold Pitch, Prospecting or Canvassing are a few of the many names given to a form of Invitation Presentation made to a potential customer where no previous relationship has been established. In this type of Invitation, establishing common ground, relationship, familiarity and a trusting mood is a must from the beginning. Unlike Warm or Hot Invitations, you will have no previous relationship to begin with and will need to rely on your ability to produce the appropriate moods and rapport almost immediately. Additionally, this is a fact finding, or qualifying mission for you and once you've established some relatedness, you will most likely need to assess whether or not they are a fit for your offer and should be made the Invitation or not.

Have them take an action that allows you to observe their personality and transactional behavior if possible. In most cases, it is recommended that some 'qualifying' move be made that allows you to establish some transactional relationship with a cold prospect. We recommend a form of application process or use of the weapon of consistency and commitment prior to, or as a condition for, attendance to your formal Presentation.

Cold calls tend to be under-qualified or under-prepared for presentations. Because of the amount of work required to make contact, confirm their appropriateness for your offer, and the mental effort required to make the Invitation, and confirm their attendance, etc., it is easy to relax the standards that ensure the prospect understands all of the details related to the Presentation. The tendency is to simply get them into the presentation. Warm and Hot leads do not take as much work, they are not as mentally draining, and since they have something at risk that Cold prospects do not, it is often the case that we weaken our approach to ensure that they are, in fact, a good prospect for our offer. We do not press them to produce the respect and appropriateness of mood, attitude and state of mind. Do not make this mistake. In all cases, make sure your Invitations inform your prospective customers of the nature of your offer and that they are properly briefed for the kind of offer they are going to receive.[1]

Warm Invitation: Warm Lead, Warm Call, or Qualified Lead are names that identify a prospective customer where some relationship, trust or rapport is already established. An example of a warm lead might be a referral from a current customer, vender or other contact. Warm leads are also those that respond to effective marketing and advertising campaigns. Because of the trust they have for the person referring them to you, your reputation, social proof or authority, etc., they know enough about your offer to willingly entertain your Invitation and/or accept your Invitation.

Warm leads are less costly than making Cold calls. Warm leads offer an opportunity to move Invitations quickly. Depending on the need for qualification and the nature of the relationship, the ideal situation is to move swiftly to establish the appropriate mood for the offer to attend or receive a formal presentation and make sure that they have been properly prepared for the presentation they are going to attend or receive.

Generally speaking, Warm Prospects, enter into the conversation for Invitation with something to lose (by virtue of the situation that makes the lead Warm). Use this advantage if need be.

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[1] There are many approaches that use divisive, confusing and misleading techniques to "get" prospects into formal presentations. They are costly in terms of time, reputation and money. We do not recommend them.

Hot Invitation: Hot prospects or leads are those that are eager to hear from you, request others to make introductions or contact you directly because of your reputation, accomplishments, authority, social proof, identity, etc. The only work to do with a Hot lead is to ensure that they are qualified, properly briefed for the offer and are not in emotional states or moods of excitement that set up unrealistic expectations related to the results of your offer. In most cases, it is a good idea not to produce excitement with Hot leads, but rather make moves to establish an advantageous status.

Hot leads or prospects are the least costly form of Invitation to produce, but they must be met with a more critical or skeptical eye. The biggest mistake made in dealing with this type of prospective customer is to move directly into Contract without taking them through a formal Presentation. Because of the excitement that is produced when prospects approach us instead of us having to approach them, we tend to treat them differently – we are more accepting, and are often less demanding in ensuring their qualification, appropriateness and understanding of the offer.

If invented properly and effectively, all of the prospects that enter into Contract with you, do so with exactly the same set of conditions or promises. They understand and can articulate your offer as a solution to a substantial breakdown and generally speaking enter into a transaction with you in the appropriate mood.

An Invitation Presentation ends with an offer to attend, receive or accept a formal Presentation of your Primary Transaction.

INVITATION CONTRACT

The Invitation Contract is the agreement that demonstrates your offer and their acceptance or decline of your Invitation to attend or receive a formal Presentation. In most cases this should be a written demonstration. The most informal and customary response to an Invitation is an RSVP, which stands for a French phrase, “repondez, s’il vous plait” which translates as “respond, please” or “please reply”. The most formal and powerful is a Reservation with Consequences where some fee, cost or consequence is levied if attendance isn’t met according to terms.

In the Contract phase of the Invitation – it is very important that an offer and acceptance be demonstrated. Email, letter, or at the very least a public acceptance, should be your standard and you will want to consider having steps invented that take into consideration the personality and transactional behavior of your prospective customer as well as your team members making and confirming your Invitation agreements.

INVITATION FULFILLMENT

All matters that are concerned with the execution of the Transaction for Invitation are planned, managed and executed as part of your Fulfillment plan. It is too late, for example, to wait until the day you make a series of Invitations to then consider what kind of agreement confirmation you are going to use, what location, methods, materials, etc. will be needed for the Presentation of the Invitations, etc. Any work that is required to make and satisfy the Transaction for Invitation is done as part of the Plan for Fulfillment.

The work you will do in Fulfillment of your Plan for Invitation is a subset of the overall Plan for Fulfillment of your Primary Transaction. The systems and structures for organizing and facilitating all of the actions required to produce effective Invitations is considered here. The more detailed, deliberate, concentrated and focused you are in your thinking and planning as you Invent the Invitation, the more successful you will be in articulating and executing your plan in practice.

INVITATION SATISFACTION METRICS

As with any transaction, making Invitations that are effective and intended to satisfy your Chief Aims will only be useful if you are collecting the results in a form and fashion that can be evaluated and properly assessed for their compliance. The metrics for the Transaction for Invitation should be collected on a periodic basis and as often as needed depending on the nature of your offer. It is most useful to gather and report metrics on a regular schedule. In highly sales driven offers where many invitations are made on a daily basis, metrics should be gathered just as often. Weekly reporting is standard for most transactions.

Keep in mind that Satisfaction Metrics are Compliance measures. Once the Fulfillment is complete, and Invitations are accepted (or not), the numbers are gathered for further evaluation and Assessment.

INVITATION COMPLETE

Few people understand the importance of the move Complete in the Invitation process. Once a prospective customer accepts or declines the Invitation to hear a formal Presentation, most enterprises dismiss the activity in a general category of measures or "follow-up". It is rarely taken seriously and as a result, many opportunities for the expansion of identity, authority, use of weapons and more are left unattended.

Formal demonstrations for the Completion of the Transaction for Invitation lead to proper Assessment, Reinvention and more importantly – future business. Some people take the same action in every case regardless of whether the prospect accepted the Invitation for a Presentation or not. Others only make moves to demonstrate Completion with those who declined or were disqualified. The move should be consistent with the nature of your offer, industry and appropriate to generate the proper moods, ethics and intent for your overall goals for the Primary Transaction.

Depending on the nature of your offer, demonstrations of Completion can be as simple as a thank you note, evaluation form, or personal call, or as elaborate as a gift, social occasion or formal presentation. The important consideration is that you take an action that is appropriate to your offer and one that preserves future opportunities with those prospects you may want to Invite again, and produces a sense and clarity for yourself and those to whom you do not intend to make future invitations.

The goal is to leave every transaction with no further action to take other than to move into the Assessment phase for yourself and/or with your team.

INVITATION ASSESSMENT

In all cases, once the Transaction is Fulfilled, Satisfaction Metrics are captured and the transaction is Complete, it is then Assessed and continues as is or is Reinvented or exhausted.

INTRODUCTION TO BUILDING THE TRANSACTION FOR PRESENTATION

A Presentation is a formal offer that results in an acceptance or decline to enter into a Contract. Any form of Presentation that does not complete with an offer to enter into a Contract is not a Presentation.

INVITATION PRESENTATION

The Transaction for Presentation begins in high and socially 'good' moods of professional gregariousness and positivity – those that best represent the offer and identity of the enterprise.

Effective Presentations always acknowledge the acceptance of the Invitation and the investment by those in attendance of the time, energy and effort made to attend the presentation or consider the offer. This form of acknowledgment is a high level move of reciprocation, liking and use of commitment and consistency.

In your Presentation you will need to demonstrate and evidence that you possess the state of mind, fitness, and general knowledge required to satisfy what is commonly known and expected of someone making the offer you put forward.

Your Presentation must include the language invented that articulates your unique and specialized knowledge of the breakdown for which your offer is a solution, and must include the articulation of specific knowledge of consequence.

With practice you will learn the skills that produce specific and predictable questions about your offer and this is where you will have the greatest success in applying the Weapons of Influence most effectively.

When you have sufficiently agitated and/or excited the biology of your specific customer, **they will lead you** into an explanation and description of your Plan (summary) for Fulfillment. They will ask questions – best if by your design – that will seemingly and effortlessly lead into the Plan for Fulfillment of your Primary Transaction.

You will need to be able to present and evidence your ability to organize and intelligently direct a thorough, coherent and objective plan of action to Fulfill on your claims to solve the breakdown, and for which you are uniquely qualified to deliver. In other words, you will need to present a powerful demonstration of how you will Fulfill on your promises and produce the positive consequences and/or help them avoid the negative consequences presented in your Presentation. This is where you demonstrate *how you will apply* your specialized knowledge to satisfy their concerns.

The presentation narrative moves - in mood and form - from the *Subjective possibilities* that "could" exist to the more narrow and *Objective terms and conditions* of what will occur once the offer is accepted and the transaction is Contracted.

The most important Contractual Terms (deal points) that will be memorialized in the Contract should be made clear in the Presentation.

A Presentation ends with an offer to Contract. Conditions for how to Contract must be clearly outlined so that there are no questions about what there is to do in the mind of the new customer if/when they are ready to accept the offer.

PRESENTATION FULFILLMENT

All matters that are concerned with the execution of the Presentation are planned, managed and executed as part of your Plan for Fulfillment. It is too late, for example, to wait until the day you are going to make a Presentation to do the work to produce the materials you may need. The location, methods, materials, logistics, etc. that will be needed for the Presentation, and all other considerations of travel, shipping, aesthetics, etc. are planned in the Invention of the Transaction for Presentation. Any work that is required to make and satisfy the Transaction for Presentation is done in consideration of the Presentation. This is distinct from the Fulfillment of your Primary Transaction. Your plan to Fulfill on the Presentation serves you and the internal processes required to hit your Satisfaction Metrics of the Presentation.

PRESENTATION SATISFACTION METRICS

As with any transaction, making Presentations that are effective and intended to satisfy your Chief Aims will only be useful if you are collecting the results in a form and fashion that can be evaluated and properly Assessed for their effectiveness. The metrics for the Transaction for Presentation should be collected on a periodic and regular schedule. In highly sales driven offers where many Presentations are made, metrics should be gathered just as often. Weekly reporting is standard for most transactions.

Keep in mind that Satisfaction Metrics are Compliance measures. Once the Fulfillment is complete, and offers made in the Presentation are accepted (or not), the numbers are gathered for further evaluation and Assessment.

PRESENTATION COMPLETE

As with Invitation, the importance of the move Complete in the Presentation process is often overlooked. Once a prospective customer accepts or declines an Offer to Contract, most enterprises dismiss the activity in a general category of measures or "follow-up". It is rarely taken seriously and as we stated before, many opportunities for the expansion of identity, authority, use of weapons and more are left unattended.

Formal demonstrations for the Completion of the Transaction for Presentation for those who decline to Contract lead to proper Assessment, Reinvention and more importantly – future business. If the prospect accepted the Offer to Contract the action to consider is an evaluation of the Presentation itself.

For the most part, it is only appropriate to make moves to demonstrate Completion with those who declined or were disqualified. The move should be consistent with the nature of your offer, industry and appropriate to generate the proper moods, ethics and intent for your overall goals for the Primary Transaction.

Depending on the nature of your offer, demonstrations of Completion can be as simple as a thank you note, evaluation form, or personal call, or as elaborate as a gift, social occasion or formal presentation. The important consideration is that you take an action that is appropriate to your offer and one that preserves future opportunities with those prospects you may want to Invite again, and produces a sense of completion and clarity for yourself and those to whom you do not intend to make future Invitations.

The goal is to leave every transaction with no further action to take other than to move into the Assessment phase for yourself and/or with your team.

PRESENTATION ASSESSMENT

In all cases, once the Transaction is Fulfilled, Satisfaction Metrics are captured and the transaction is Complete, it is then Assessed and continues as is or is Reinvented or exhausted.

Using the work you are doing on the Thirteen Steps, you now have a foundation on which to reinvent your Invitations and Presentations.

Consider all of the Work you have done so far in your Study. Consider what Conditions of Life your Transaction takes care of for your Specific Customers. Consider what kind of Invitations and Presentations you might design if you were to have the occasion to speak as part of a public event, membership social, mixer, or other situation. What you may find, as many report, is that once you are prepared to act, the occasion for it presents itself in all kinds of ways you had not imagined.

Consider in moods of imagination and possibility how you might Invent events that appeal to the Specific Ecology for which your Transaction is a solution. Consider what you have learned in the process of making Invitations and Invent new ways of producing Warm and Hot leads for you and your Team. Imagine how you might couple Invitations with your Presentations so that you are able to generate new Warm or Hot leads as part of your Presentation or offer.

Most of all – study, think and plan accurately – then – ACT.

Deliberate Practice

Deliberate practice is characterized by five essential and necessary elements, which are:

1. Designed specifically to improve performance
2. Repeated a lot
3. Feedback is continuously available
4. Highly demanding mentally, and
5. Not much fun

This program is designed to support the deliberate practice of study and application of the Fundamentals of Transaction.

If you have not committed these five elements of Deliberate Practice to memory and can articulate your understanding of each as it pertains to your Primary Transaction – it is unlikely that you are applying them consistently. You must be able to speak it before you can act it.

Your Brain at Work

by David Rock

Read Chapters 1 through 4.

Read the book at least one time before attending The Annual Member Conference that begins on January 19th 2012.

Spark – The Revolutionary New Science of Exercise and the Brain

By John J. Ratey, MD

Schedule time to read the book at least one time before attending the Annual Member Conference.

With the wonderful traditions and customs of the holidays approaching, which include lots of food and beverage - we recommend reading the book sooner than later!

Influence – Science and Practice

By Robert Cialdini

Embodying the Weapons of Influence means that you understand, can apply and are able to correlate them to situations and circumstances to gain the compliance of others. You will be asked to demonstrate their use throughout this program. Refer to, and use the book as you consider Inventing your Transactions for Invitation and Presentation.

Read and study any weapon that you do not understand fully and/or cannot apply to your current offer.

PROGRAM MEASURES

Program measures established in Study One will continue to be collected throughout the program. If you have any question or concern regarding any aspect of the program measures please contact us during this Study to ensure their accuracy.

Have a prosperous month – smile more often, send more thank you notes, and make more offers.