



Why Stay agenda

AM

PM

9:00 – 9:30

launch

- **Activity: Retention Role Plays**

9:30 – 9:45

- Acquisition ≠ Expansion
- Status Quo Bias

9:45 – 10:15

- **Activity: Groups select an account and describe the status quo**

10:15 – 10:30

- Messaging Void

10:30 – 10:45

break

10:45 – 11:15

- Partnership Planning
- Triple Metric

11:15 – 12:15

- **Activity: Brainstorm triple metric**
- **Activity: Debrief & discussion**
- **Activity: Groups create triple metric linkages**
- **Activity: Group review and feedback**

12:15 – 1:00

lunch

1:00 – 1:15

Why Stay

1:15 – 2:45

- **Activity: Groups create Why Stay message Part 1**
- **Activity: Groups create Why Stay message Part 2**
- **Activity: Groups create Why Stay message Part 3**
- **Role play message coaching and feedback**

2:45 – 3:00

break

3:00 – 3:45

Why Pay More

- **Activity: Groups add Why Pay More to a Why Stay message**
- **Activity: Group review and feedback**

3:45 – 4:50

apologizing

- **Activity: Groups create a Why Forgive message**
- **Activity: Group review and feedback**

4:50 – 5:00

- Wrap-up





Why Evolve agenda

AM

9:00 – 9:20

launch

- Day 1 concept review

9:20 – 9:35

Why Evolve

- **Activity: Groups Document Results for a Why Evolve message**
- Readout

9:35 – 9:55

9:55– 10:10

break

- **Activity: Groups describe the Upside Opportunity**
- **Activity: Groups identify Evolving Pressures**
- **Activity: Groups define Hard Truths & Risk of No Change**
- **Role play message coaching and feedback**

10:10 – 11:50

11:50 – 12:35

Lunch

PM

12:35– 1:25

manage business reviews

- **Activity: Groups create a Business Review Agenda**
- **Activity:** Group readout and feedback

1:25 – 2:15

customer story with contrast

- **Activity: Groups create a customer story with contrast**
- **Activity:** Group readout and feedback

2:15 – 2:30

break

2:30 – 3:20

memorable visuals

- **Activity: Groups create a visual with contrast**
- **Activity:** Group readout and feedback

3:20 – 3:50

Activity: Groups consolidate their Why Evolve (or Stay) message with a customer story and visual

3:50 – 4:50

Role play message coaching and feedback

4:50 – 5:00

- Wrap-up
- Activate Reinforcement

