Up-A-Notch™ Sales Training System for Outside Salespeople

By Dave Kahle

“Organizing a Sales Call- The Basics”

Facilitator’s Guide

Congratulations, you are going to facilitate this training session.

Your job includes these things:

- facilitating the group conversations
- supporting and encouraging each member
- managing the details of the program
- holding people accountable for doing their assignments.

It's important that each member of the group personally consider the material on the tape and do the exercises in this manual. Instead of "teaching," your job is to help them learn. That means ensuring that each participant completes the exercises, enters into the dialogue, and faithfully keeps to the learning procedures built into the program.

It's really not that difficult. Just follow our directions. As you complete each task, check the line in front of it.

> *Note: If you have more than eight participants, we recommend you split the group into two small groups with four or five participants in each and hold separate training sessions for each group. The exercises are designed for small groups, usually no more than seven people.*

Here's how to do it…

<u>Prepare for the session:</u>

______Make sure you have a working video player and monitor, or as a less desirable option, an audio cassette player.

______Have an easel or white board available.

______Prepare one set of materials for each of the participants.

- ✓ Have one Participant Guide for each participant. If you need more, contact The DaC0 Corporation at 800-331-1287 to order additional materials.

- ✓ Split up the "bubble pads" so that each participant has at least three sheets. Split up the "prescription pads" so that each participant has at least two sheets.

- ✓ Obtain the copies of the "Prescriptions" that were written at the end of the last meeting.

- ✓ Arrange the chairs in a comfortable, semi-circular pattern.

______Send a written invitation/reminder to each participant. Remind them to bring something to write with, and to hold their calls.

<u>During the training session:</u>

______Begin with a discussion of the progress the participants made on their previous prescriptions. Get last session's prescriptions then say this:

"At each training session, we will all be making commitments for things we are going to do differently. In some cases, we may reconnect to something we already know we should be doing. In other cases it maybe something we haven't done before, regardless, making these commitments or writing "prescriptions", is a part of every session.

A part of every session is following up on the prescriptions we wrote in the previous training session. That is what we are going to do now. I am going to read each prescription and ask you how you are doing on that.

I will go first."

______Now, read your prescriptions and explain in detail how well you have done at accomplishing it. If you noticed some positive results, make sure that you describe them and relate these results to the actions you took on your prescription. Remember to give a well thought out, honest, detailed report. The other participants will copy your modeling of how to report.

Then proceed to ask each person to report. Say, *"(person's name), you said you were going to (read the prescription). Tell us what you did."*

When appropriate, also ask, *"What result of your actions did you see?"*

Be sure to thank everyone who reported, and to positively encourage those who followed through on their prescriptions.

______Distribute the handouts. Allow them a few minutes to review the materials. Tell them the pages marked "Notes" at the top are to be completed while the tape is being played, and the pages marked "Exercises" are for after the tape is finished.

Say this:

"Today's topic is "Organizing a Sales Call – The Basics." Take a couple of minutes to look through the materials. Note that the pages marked "Notes" at the top are to be completed while the tape is playing, and the pages marked "Exercises" should be completed afterward."

______When everyone is ready, turn on the tape. Continue to view (listen to) the tape until it is finished.

Following the end of the tape:

______Immediately after the tape is finished, give everyone a few moments to complete their "Notes."

Say this:
"Take a couple of minutes now and finish filling in the blanks on the 'Notes' exercise."

The participants may want to discuss the notes or some aspect of the taped presentation. Allow them to do so.

______*Exercise One: Analyzing a recent sales call.*

- ✓ Give everyone a few moments to read the directions.
- ✓ Have them work individually. Allow about five minutes to complete the exercise. When everyone is finished, have each person discuss his analysis with the group. After everyone has shared their work, move on to the next exercise.

______*Exercise Two: Articulating Features and Benefits.*

- ✓ Give everyone a few moments to read the directions.
- ✓ Cluster them together in groups of three to fivc, and have each group work together on the exercise.

- ✓ Allow them five to fifteen minutes to complete the exercise.
- ✓ When everyone is done, have each group share their thoughts. Ask why they chose the particular features that they did. Pay particular attention to the benefits. If you are at all in doubt as to whether a particular statement is actually a benefit, ask the group to comment. Say, *"Is that statement a benefit? Does it meet the criteria of answering the question 'What's in it for me?' Does it talk about the customer?"* The purpose of this exercise is not necessarily to be 100% correct. Rather, it is to get the group in the habit of thinking about features and benefits correctly.
- ✓ After each group has shared their work, move on to the next exercise.

_____***Exercise Three: Generating Ideas***

- ✓ Give everyone about five minutes to complete three of their yellow bubble pads.
- ✓ Then, once again, ask people to share their ideas. This exercise will help others understand how to record a "good idea," and will stimulate additional ideas.

Say this:

"Now let's share some of these ideas. I'd like each person to share at least one. If you hear someone else's idea and that makes sense to you, feel free to record it as your own on one of your bubble sheets. You can have more than three. (Call on someone or go first yourself) ____________, what's one of your ideas?"

- ✓ Continue in this way until everyone has had a chance to share at least one idea.
- ✓ If people are hesitant to share, or if they have no ideas, take a few extra moments to review the content of the tape by going through the "Notes" exercise. Review each major point, and ask people to comment on it.

Say something like this…

"*The first point he made was that ……………*"

"Does that make sense to you?"

"How could we use that idea in this organization?"

"Any way that you might be able to use that?"

- ✓ In this way, continue down through the "Notes" exercise, reviewing each point, and encouraging people to find "ideas" and write them down.

_____***Exercise Four: Distilling the Best***

- ✓ Give everyone a few moments to complete it.
- ✓ Ask each person to share his or her ideas.

_____***Exercise Five: Precisely Prescribing***

- ✓ This time, ask each person to make a copy of his or her prescription, writing it on an additional Prescription pad. Ask each to write his/her name on the prescription, and turn it in to you.
- ✓ Mention that at the beginning of the next session, the group will review each of these prescriptions in order to hear what progress each person has made.

Say this:

"At the beginning of the next session, we'll take a few minutes and find out what progress each person has made on his/her prescriptions. Be prepared to tell us what you did, and what results you saw. We'll be looking especially for success stories."

______Now, confirm the time, date and place for the next session, and close this session.

______Fill out the evaluation form (next page) and fax it to 616-451-9412.

Congratulations! You have just successfully facilitated this training session.

Evaluation

Please complete this form after the training session and fax it to 616-451-9412.

Lesson Title:____

How many people attended: _________ Date of session: __________

Based on your discussion of the progress made on *last month's prescriptions*, which of these occurred? Check one in each column.

____ No one acted on their prescriptions.
____ A couple of people acted on their prescriptions.
____ Most attempted to complete their prescriptions.
____ Everyone acted on their prescriptions.
____ Everyone reported positive results.

____ There were no positive results.
____ A few people indicates some positive results.
____ Most reported positive results.

One such result was:

____

Please place a check in the box for how you believe the majority of the people would respond.

	Not at all	A little	Somewhat	A lot	A great deal
How practical & useful was the content?					
How practical & useful were the exercises?					
How easy was the program for you to facilitate?					

What was the most valuable thing your people gained?

____
____
____

What one thing would you suggest we change for next time?

____
____
____

Do you have any suggestions for topics that we should test in the future? Please describe.

____
____
____

Optional: Your Name ______________________________ Phone # ________________

Email____

Organizing a Sales Call- The Basics

Notes & Exercises

Notes

While most of what you do can be done _(better)_ or _(cheaper)_ by someone else, not all of what you do fits into that category. There is one thing that no one can do as _(well)_ as _(you)_. And that one thing is – _(meeting)_ _(face)_ _(to)_ _(face)_ with your _(customer)_. If it weren't for that – you'd be _(unnecessary)_.

Meeting _(face)_ _(to)_ _(face)_ with your customers is the _(heart)_ of the sales process.

Most surveys of how salespeople spend their time indicate that the average _(outside)_ _(salesperson)_ spends anywhere from _(20)_ to about _(35)_% of their working week actually meeting with customers. Imagine that.

To begin, let's think about the most basic steps of the sales process. What you do when you speak with your customers is this:

* You make them _(comfortable)_ with you.
* You find out what they _(want)_.
* You describe what you _(offer)_.
* You show how what you _(have)_ helps them get what they _(want)_.
* You get their _(agreement)_ to take the next _(step)_.

That simple five-step process is basic to every interaction you have with your customer. It's the heart of _(influencing)_. It can take months to complete in an intricate sales _(process)_, or it can be whisked through in two minutes over the _(phone)_.

Let's examine the process and consider how to master it. When you master it, you'll be able to use it effectively countless times throughout the week.

Now I describe this process as *managing a sales interaction. Managing* describes (your) major role. Your primary role is to (manage) the (communication) process between you and your customer.

Interactive refers to the notion that the (communication) is (two)-(way), not one-way. It consists of (conversation) between you and your customer. Selling isn't (telling). If anything, the (more) your customer (talks), and the less talking you do, the more (effective) the sales call is.

Sales refers to the fact that this communication is moving toward an (agreement) between the (two) of you.

Finally, it's a (dialogue). That means it's an honest exchange of (feelings), facts, (values), and (perceptions).

Now, understanding the definition of the process, the question is "How do you manage an interactive sales dialogue so that the chances of its success are enhanced?"

The first step is to Get to the batter's box (Help them feel comfortable with you.) Getting to the batter's box means that you have created a (feeling) of (comfort) and (trust) in the customer.

Once you've achieved that, you can move on to the next step -- getting to first base. In sales, that means (understanding) the customer.

This is the time to implement all the (questioning) skills we discussed in earlier sessions. Use them effectively, and you'll do a (masterful) job of getting to first base.

In baseball, once you've gotten to first base, your next goal is second base. So too, in sales, once you've acquired an (understanding) of your customer, it's time to (present) your product/service or (offering).

From there, third base is the goal. In sales, that means describing how your product/service/offering will impact the (person) - your (customer).

In baseball, nothing really matters until someone crosses (home) plate. Only then does the score change, and all your effort (count). So, too, in sales. Nothing really (matters) until you get an (agreement) from the customer to take the (next) step.

Let's begin with this principle.

Principle: Presentations are always about two subjects: your offering and your customer.

One of the most common mistakes that salespeople often make is this—they focus their presentation on (their) (offerings) (exclusively) – forgetting to talk about the (customer).

To be effective, you need to sift through all the features of the product/service, select those that are most important, and relate them to the (customer). Here's how you do that.

Step One. Describe your best understanding of the customer's (objectives).

Begin your presentation with a restatement of what your (customer) wants to (accomplish)– the problems to be overcome or the objectives to be gained.

Step Two. Identify the salient (features) of your product or service.

Features are (describable) (characteristics) of your product/service/offering.

Step Three. Communicate the *(features)* with *(detail)* and *(power)*.

Step Four. Translate the features into specific *(benefits)*.

When you translate a feature into a benefit, the subject of your sentence *(changes)*. When you're describing a feature, you talk about *(it)*. What you're describing a benefit, you talk about *(your)* *(customer)*.

Step Five. Render those into descriptions of positive emotions.

Exercise One: Analyzing a Recent Sales Call

Directions: Analyze a sales call that you made in the last couple of days. Apply the concepts discussed in today's video. Work by yourself and fill in the form below.

Person called on:____

Company name:____

Date of call: ____________________Time:____________ Duration of call:_______

1. What did you do to make this person more comfortable with you then he/she was before the call? ____

2. What did you learn about the individual and/or the company that you did not know before the call? ____

   What did you do to prompt that learning?____________________________________

3. What did you present to the customer? ____________________________________

4. What agreement did you achieve? ____

Exercise Two:
Articulating Features & Benefits

Directions: Select a product, service or program that you sell. Then picture a specific customer. List the features of that product, service or program that you believe match that customer's needs and interests. Finally, translate each feature into a benefit for that particular customer. Remember, a feature is a specific characteristic of the offer. A benefit answers the question "What's in it for me?" A feature is about your offer, a benefit is about your customer.

Customer:______________________________________

Product/service/program:____

Features	Benefits
______________________________	______________________________________
	______________________________________
	______________________________________
______________________________	______________________________________
	______________________________________
	______________________________________
______________________________	______________________________________
	______________________________________
	______________________________________
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______________________________	______________________________________
	______________________________________
	______________________________________

Exercise Three: Generating Ideas

Use the bubble pads to write down at least three good ideas you gained from today's session. Remember the four criteria for a "good idea." We've illustrated a couple of samples for you.

Remember, a good idea is one that
- *focuses on the future*
- *focuses on action*
- *focuses on your behavior*
- *is a small step toward one of your learning goals.*

Decide to invest a certain amount of time in self-improvement every month.

Use a specific process in order to learn more effectively.

Exercise Four: Distilling the Best

Select the one good idea from the previous exercise that you think is the best. To help you make that selection, ask yourself these questions:

1. Which of these ideas could make the fastest impact on my performance?
2. Which of these ideas would make the biggest impact on my performance?
3. Which of these ideas am I most passionate about?

Rewrite that idea here.

Exercise Five: Precisely Prescribing

Turn the idea from the previous exercise into a Precise Prescription. Write that prescription on the Rx pad. We've done an example for you. Now, take your prescription and post it someplace where it will remind you to do it.

Rx (Precisely Prescribe)

I will set aside two hours every week for personal improvement and keep a record of what I do in that time.

SAMPLE