REPRODUCIBLE TRAINING LIBRARY

Customizable Soft-Skills Courseware

Selling Essentials: Developing Clients for Life

Instructor Guide

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Instructional Design and Learning Philosophy

Sound Instructional Design

We are committed to providing core skills content that is relevant to today's organizational and personal development needs. Our expert instructional designers create imaginative and innovative solutions for your training needs through the development of powerful instructional elements. These elements include:

- **Learning objectives** *that provide effective tools for managing, monitoring, and evaluating training.*
- **Relevant topics** *that create meaningful connections between the course and participants' prior experiences.*
- **Appropriate organization** *of essential ideas, which helps participants focus on what they need to know in order to learn.*
- **Modeling techniques** *(where applicable) that demonstrate useful behaviors and problem-solving skills.*
- **Active experimentation***, the cornerstone of learning, which helps participants connect what they've learned to real-life situations.*
- **Consistent instructions and thoughtful visual design** *that help participants learn and retain new information.*

Due to the wide range of subjects covered in the Reproducible Training Library, the number of instructional elements and learning techniques varies between titles.

Application of Adult Learning Principles

Adults learn best by incorporating their personal experiences into their training and by applying what they learn to real-life situations. We support this process by incorporating a variety of learning techniques—role-plays, simulations, discussions, and lectures—into each course in order to appeal to all learning styles and ensure that the information will be retained.

Customizing Your Program

There are two ways you can tailor this program to your specific needs. You can customize the content and you can customize the format.

We created this program in Microsoft Word® to make it easy for you to modify the content as you would in any Word document. The Instructor Guide and Participant Guide follow an identical structure, so you can readily see how a change in one guide can be applied to the other. Common reasons for customizing content include:

- *Changing examples to fit your industry or work environment*
- *Modifying content to match work rules and procedures*
- *Adding, deleting, or rearranging content to accommodate training time constraints*

Another way to customize this program is to change the formatting. Some organizations add their corporate logo or branding, and a few make changes just to suit a preference. Again, treat the Instructor Guide and Participant Guide as you would any Word document. For additional help formatting Word documents, consult Microsoft's website.

Please note: Only the pages highlighted in yellow below are those featured in this preview.

Contents

Course Objectives

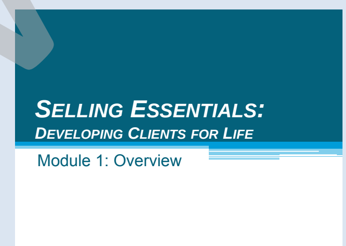
Successful completion of this course will increase your sales knowledge and your ability to:

- *Explain the process of product implementation and plan how to develop clients for life*
- *Describe how to develop strong, mutually beneficial client relationships*
- *Discuss effective techniques for building customer relationships*
- *Identify strategies for capitalizing on customer relationships*

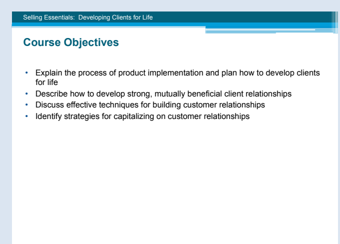
Trainer Notes

5 minutes

Introduce yourself and provide a brief background about yourself if participants don't know you.



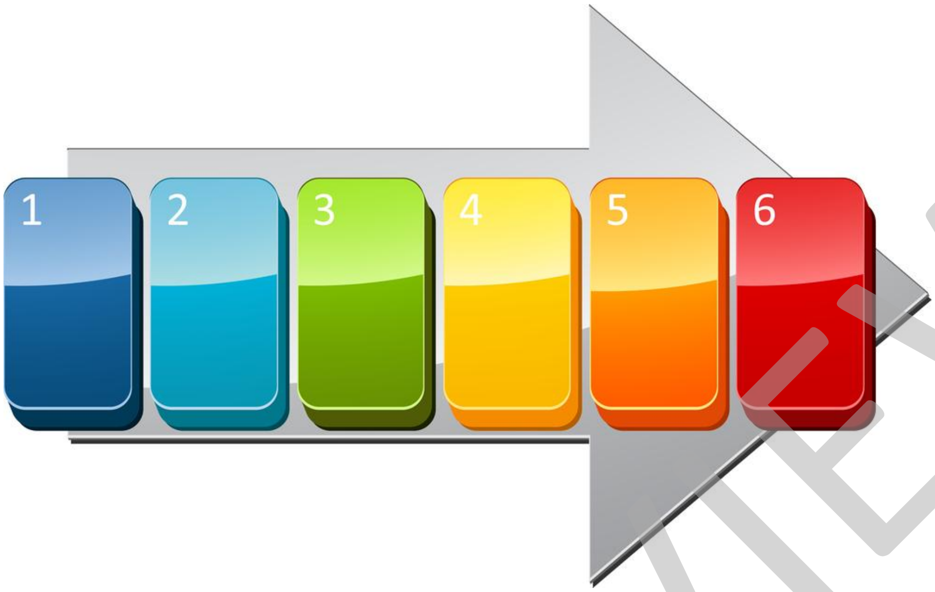
Go over logistics (schedule, breaks, restrooms, etc.) and any ground rules for the day. Typical ground rules include no use of electronics, showing respect for every participant, participating fully, no dominating or interrupting, etc.



Review the course objectives with participants.

Note that in this course we will use the terms "customer" and "client" interchangeably.

The Sales Process



1. *Prospecting and Territory Management*
2. *Opening the Sales Call*
3. *Listening and Questioning*
4. *Presenting Solutions*
5. *Overcoming Objections and Closing*
6. **Developing Clients for Life**

Trainer Notes

5 minutes

"Let's look at where we are in the sales process. First you spent time prospecting and identifying qualified leads. Next, you did your homework and convinced the prospect to meet with you. Then, you met face-to-face with this prospect. Each time you met with him, you opened the Sales Call. You positioned yourself as an expert and set a positive tone for doing business."

"As you got to know the prospect and asked questions to understand his needs, you listened to his answers to determine whether there was a solution your company could provide to fit those needs."

"You presented the best solution. You may have had to overcome customer objections or concerns. Then you closed the sale."

"Now you are at the point where you will continue to build and cultivate the relationship."

"In this course, we will talk about Step 6 of the sales process: developing a stronger relationship and hopefully gaining a client for life."

Self-Assessment

Individual Activity

***Instructions**: Reflect on your past experiences. Be honest with yourself as you assess your skills.*

Read each of the following and write the number that applies:

1–Never 2–Rarely 3–Sometimes 4–Often 5–Always

Implementation	**Rating**
I stay in touch with my customer after the sale is made.	
I ensure that the product is delivered or implemented to the customer's satisfaction.	
I have a plan in place to handle potential problems or complaints.	
Planning for Follow-Up	**Rating**
I create a plan to follow up with my customer after the sale.	
I involve my customer in my follow-up plan.	
I ask my customer his preference for means of communication.	
I use creative strategies for communicating with my clients.	
Building the Relationship	**Rating**
I am adept at building long-term relationships with my clients.	
I fully comprehend my client's industry and competitive challenges.	
I ensure that everyone in my company delivers excellent customer service to my clients before, during, and after the sale.	
I know my customer's corporate and individual priorities.	
I know how to bring unique value to each customer.	
I can handle obstacles in building relationships.	
Capitalizing on the Relationship	**Rating**
I know how to build trusting relationships and loyal customers.	
My customers perceive me as a leader in my industry and come to me for expert advice.	
I find and take opportunities to upsell within my customer accounts.	

As I reflect on my experience and skills in developing clients for life:

My key strength is: ______________________________________

My top area for improvement is: ____________________________

Trainer Notes

10 minutes

"Before we look at what it takes to develop client relationships, let's reflect on our skills and experiences in this area."

Activity: Review the instructions. Allow 5 minutes for participants to take the assessment. Assure them that this is confidential and for their own review.

Debrief by leading a discussion about recognizing strengths and areas for improvement. Note that this course is meant to provide participants with ideas for sharing best practices, help them build on their strengths, and give them opportunities to improve where needed.

Tell participants to be aware of the areas in which they want to improve during the course. Encourage them to ask questions so they get the most out of this experience.

Module 2

Implementation and Follow-Up

Implementation

Most sales reps disappear after the sale is made and the product is delivered to the customer. They mistakenly think that their work is done, but their job of servicing the customer and building the relationship has just begun.

Sales reps should make a point to stay in the loop with the customer and the internal team that handles the implementation or delivery of the product. They should find out what went well and what could have gone better in those processes.

Successful reps devise a personalized implementation plan and share it with the customer prior to the implementation of the product or service.

Top reps let their customers know that they are confident that the implementation will run smoothly. However, they make it clear that if anything does not meet the customer's expectations, they want to know about it. Successful reps follow up during the implementation to ensure satisfaction. Additionally, they set up a plan to stay in touch to ensure continuing satisfaction and value for the customer.

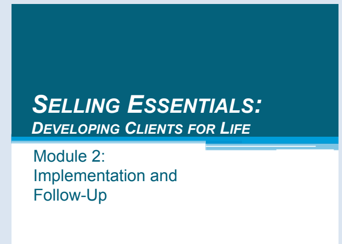
Successful reps let their customers know that they are experts at:

- *Handling complaints*
- *Providing customer satisfaction*
- *Planning for follow-up*
- *Communicating with customers*

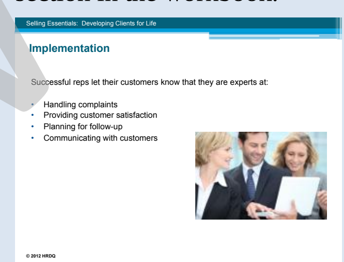
> *"It takes as much energy to wish as it does to plan."*
>
> *—Eleanor Roosevelt*

Trainer Notes

10 minutes



Allow 5 minutes for participants to read this section in the workbook.



Lead a discussion on why it's so critical to be involved in the implementation.

Ask: "What are the benefits of being clear with customers about the implementation process from the start?"

(Potential responses: There won't be surprises; customers will feel comfortable coming to us should there be a problem; putting a plan in place for following up gives sales reps a chance to make contact again and further develop the relationship.)

Ask: "What do reps find are the challenges of staying involved in the implementation?"

(Potential responses: We have to manage other responsibilities; it can be difficult to get the customer's time and attention.)

Handling Complaints

Tips to Handle Customer Complaints

- *Respond promptly.*
- *Listen without interrupting.*
- *Respect the customer's point of view.*
- *Reassure the customer that you will do everything you can to resolve the problem; express empathy.*
- *If you don't have an answer to a complaint, tell the customer you don't have one yet, but you'll get one.*
- *If you have to give bad news, be honest, upfront, and direct.*
- *Involve your management if appropriate.*

Group Activity

Instructions: *Think of a time when you were a customer and had a complaint. What happened? Did the sales rep handle it poorly or well? What can you learn from this situation? Share your ideas.*

Based on this, what are your tips for how to treat your customer if there is a complaint? Be prepared to share your top tips with the class.

"Customers don't expect you to be perfect. They do expect you to fix things when they go wrong."

—Donald Porter
VP, British Airways

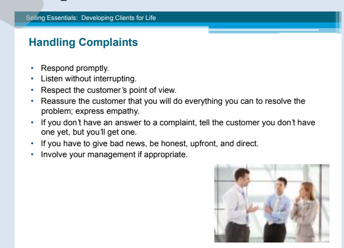
Trainer Notes

15 minutes

"In today's digital world, where word travels quickly, don't underestimate the power of a dissatisfied customer. The saying 'the customer is always right' is still true."

"It is important to be prepared, in case something goes wrong and the customer experiences a problem or has a complaint."

Review the tips for handling complaints.



"If customer retention is the end goal, be quiet and listen without interrupting. It may be tempting to defend yourself, your employees, or your product, but it is best to listen intently and understand where your customer is coming from."

Activity: Review the instructions. Allow 10 minutes for groups to identify tips.

Debrief by asking each group to share their top tip.

(Potential responses: Be sincere and apologetic; apologize and show empathy; "make good" on the situation by offering a partial credit or whatever makes good business sense; ask the customer what they think would be fair; bring your manager in to explain the policy.)

Conducting a Customer Satisfaction Survey

First, determine when you want to survey your customer. Then, decide how you want to administer the survey (for example, in person, via email, or over the phone).

Questions to Ask

How satisfied are you with the product you purchased?

How satisfied are you with the service you received?

How satisfied are you with our company overall?

How likely are you to buy from us again?

How likely are you to recommend our product/service to others?

How likely are you to recommend our company to others?

What did you like best about the product, our customer service, and our company?

How could we improve the product, our customer service, and our company?

What to Do with Customers' Feedback

Always act on the information you receive from customers through the survey.

Make improvements on issues the customers noted or complained about.

Investigate their suggestions.

Let customers know that their answers were appreciated and are being acted upon.

"There is place in the world for any business that takes care of its customers—after the sale."

—Harvey MacKay

Trainer Notes

10 minutes

"Asking if your customer is satisfied gives you a good reason to stay in touch and helps build the relationship."

"Your company's marketing department may have a customer satisfaction program in place. If not, here are some ideas to help ensure your customer's satisfaction."

"By following up on your customer's satisfaction, you will gain useful information and further develop your relationship."

"First, determine realistic times to survey your customer. You may wish to follow up immediately after implementation and then again after a few months."

"Then you can decide how you want to administer the survey: informally, in person, in writing, via email, etc."

Review Questions to Ask and What to Do with Your Customer's Answers.

Note that these are ideas that reps can modify for their discussions with customers.

Discuss the importance of maintaining customer satisfaction during and after the implementation phase.

Ask: "What are the challenges of executing a Customer Satisfaction survey?"

(Potential responses: Balancing selling responsibilities and finding time to develop current customer relationships; getting the customer to agree to take the time with you; providing a safe environment where the customer feels open to giving honest feedback.)

Listening to Customers' Needs

As you get to know your customer, you will learn more about him. How do you do that? By asking questions and listening to what he needs. As the relationship develops after the sale, you will uncover new opportunities. Be sure to pay attention to your customer and any additional needs he may have.

How is your customer doing? What specifically does he need? To find out, you need to think in terms of the customer's individual and organizational priorities. It's helpful to keep the customer's corporate vision and mission statement in mind as you try to uncover current and future needs.

Client objectives and priorities sometimes change without notice, so we need to ask questions to stay current.

Clarifying questions *are open-ended questions that probe and provide further understanding.* **Open-ended questions** *require longer answers that get the prospect to open up and elaborate.*

Open-ended questions typically start with:
• *How…* • *What…* • *Why…* • *Tell me…* • *What kind…*

Clarifying questions enable you to understand the customer's expectations, priorities, and needs in a more detailed way. These questions allow free responses that may reveal hidden concerns or feelings. By asking clarifying questions like those below, you can get more accurate information about what the customer is thinking.

- *"Tell me more about that …"*
- *"Why is that important?"*
- *"How does that help in the long run?"*
- *"What do you mean?"*

Example of a clarifying question I may ask my customer:

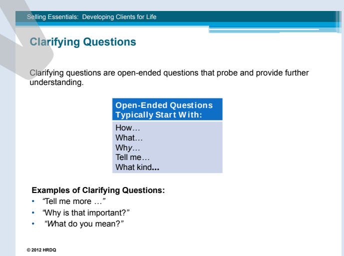
____

____

Trainer Notes

10 minutes

"Listening to customer needs and addressing them will help you develop relationships. When you made the sale, you uncovered a customer need and provided a solution. You must continue to listen for needs so you can provide added value, enhance your customer relationships, and perhaps upsell and land more business."



Review clarifying questions and open-ended questions.

Ask two or three participants to share an example of a clarifying question they may ask their customers. Have the class confirm that these are in fact clarifying questions.

Handling Obstacles

Even with all the best tips and strategies, you may occasionally find it difficult to build a relationship with a customer.

When a customer doesn't seem to want a relationship with you:

- *Don't take it personally.*
- *Keep the situation in perspective.*
- *Remember that there are different trajectories for building trust and relationships.*
- *Try to get to know them; uncover their needs, priorities, and interests.*
- *Shift your energy to other customers.*

Group Activity

***Instructions:** Read the case study and work together to devise a plan to overcome the obstacles to developing a relationship with this customer. List your specific ideas here. Be prepared to share your ideas.*

***Case:** Bill Frida, the CFO of Magna Manufacturing, is your newest customer. It took almost a year to land this deal. You are thrilled to have the opportunity to work with Magna and Bill. He is charismatic, smart, and respected by his staff. You took great care in crafting an email to him to make sure that the implementation phase met his satisfaction but he didn't reply. You left a couple of voicemails and didn't hear back on those either.*

Your internal project manager said that the implementation went well overall, although there were a couple of minor problems. She said that she worked them out with the front line manager involved, who seemed satisfied.

How will you proceed as you leave the implementation phase and move forward to build a relationship with Bill?

How can you provide value when you can't get through to Bill and don't know his "hot buttons"? What can you do to overcome the obstacles in developing a relationship with Bill?

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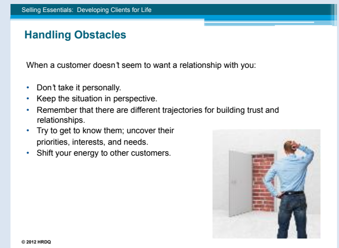
Trainer Notes

20 minutes

"Even successful reps face obstacles in developing relationships."



Review the obstacles.

"When a customer doesn't seem to warm up to us or want a relationship, it's easy to take it personally. Try to keep things in perspective—this might be your biggest account, but it may be just a fraction of your client's responsibilities."

"Remember that people develop trust at different speeds. There are different trajectories for building relationships. It may simply take time to get to know them and earn their trust. Also, as you learn about their needs, priorities, and interests, you can prove yourself a valuable resource as time goes on."

"Lastly, if all else fails, you may have to accept that you just aren't going to click. In this case, it's best to shift your energy to other customers."

Activity: Review the instructions. Allow 10 minutes for groups to identify tips.

Debrief by asking each group to share their ideas.

(Potential responses: Be patient, do more research, send him an article that will appeal to him; get an introduction from a coworker; build relationships with other people in the company.)

Account Checklist: Developing Your Relationships

Use this checklist for each account. It is meant to be used as a tool to help you focus on your customers so you can grow and deepen your relationships. There is a blank form of this checklist in the Appendix.

Individual Activity

Instructions: *Think of one of your customers. Complete this checklist with that customer in mind.*

Client: ____

Issue to Consider	Questions to Ask
Current Position	☐ *What is my current position with this client?*
Current Challenge	☐ *What is the main challenge I face in developing and managing this relationship?*
Client Priorities	☐ *What are the client's corporate priorities and goals?* ☐ *Individual priorities?*
Cycle of Success	☐ *What are the upselling opportunities to grow this account?*
Relationship Development	☐ *What executive relationships should be developed to sell the opportunity noted above?*
Necessary Resources	☐ *What internal resources are needed to maximize this account?*
Next Steps	☐ *What needs to be done? By whom? When?* ☐ *How can we add value?*

Trainer Notes

20 minutes

"Throughout this course, you have heard about many ideas for building loyal customers. This checklist is a tool that will help you use these ideas as you develop customer relationships."

Activity: Review the instructions. Allow 10 minutes for individuals to complete the checklist.

Debrief by having participants pair up with a partner for a "pair and share" activity. Each will review the other's work. They may provide constructive feedback or offer new ideas as they review each other's checklists.

Allow 5 minutes for the first person to share his work and for the partner to provide a critique, then reverse roles so both have a chance to have their work critiqued.

Note: There is a blank form of this checklist in the Appendix.

Course Review

1. List at least three of the keys to developing client relationships.

____

____

____

2. List at least one type of question that will uncover customer priorities.

____

____

3. Which is the correct sequence of Relationship Development?

a. Acquaintance, Associate, Vendor, Trusted Advisor, Trusted Associate

b. Associate, Acquaintance, Vendor, Trusted Vendor, Trusted Rep

c. Acquaintance, Associate, Vendor, Trusted Vendor, Trusted Advisor

d. Acquaintance, Associate, Vendor, Trusted Rep, Trusted Vendor

4. If you make a mistake with a client, it is best to admit it and be honest about it. True or False?

5. When dealing with customers, it is a best practice to be reliable, follow up, and to do what you said you would do. True or False?

Answer Key

1. Creativity, sincerity, authenticity, passion, dedication
2. Clarifying or open-ended questions.
3. c
4. True
5. True

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Rosemary C. Rulka, MS, SPHR
President
R.C. Rulka Consulting, LLC

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James T. Puett
Manager, Leadership and Organizational Development
Healthways Human Resources

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