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Customizable Soft-Skills Courseware

Selling Essentials:
Opening the Sales Call

Instructor Guide

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Instructional Design and Learning Philosophy

We are committed to providing the best core-skills content possible for Instructor-Led Training (ILT). The following principles are applied in the development of programs:

Sound Instructional Design

All course content is developed using a variety of research techniques. These include:

- *Brainstorming sessions with target audience*
- *Library research*
- *Online research*
- *Customer research (focus groups, surveys, etc.)*
- *Subject Matter Experts (SMEs)*
- *Interviews with trainers*

Expert instructional designers create imaginative and innovative solutions for your training needs through the development of powerful instructional elements. These include:

- *Learning objectives provide effective tools for managing, monitoring, and evaluating training*
- *Meaningful connections are made between the topic and students' past, present, and future*
- *Appropriate organization of essential ideas helps students to focus on what they need to know in order to learn*
- *Modeling techniques demonstrate useful behaviors and problem-solving skills*
- *Active application, the cornerstone to learning, helps students immediately apply what they have learned to a real-life situation*
- *Consistent instructions and design help students learn and retain new information*
- *Accelerated learning techniques create interactive, hands-on involvement to accommodate different learning styles*

Application of Adult Learning Styles

Adults learn best by incorporating their personal experiences into their training and by applying what they learn to real-life situations. Our experienced instructional designers incorporate a variety of accelerated learning techniques, role-plays, simulations, discussions, and lectures within each course to appeal to all learning styles and ensure that the ideas and information will be retained.

Customizing Your Program

There are two ways you can customize this program:
1) Customize the content and
2) Customize the format.

Customizing the content is easy. The Instructor Guide and Participant Guide are created in Word, so you can simply modify the content just as you would in any Word document. Some 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 meet training time constraints*

The other way to customize the program is to change the formatting. Typically, organizations will do this to add their corporate logo and/or colors, or it may just be an issue of personal preference. Again, treat the Instructor Guide and/or Participant Guide as you would any Word document. The styles used in this document are labeled HRDQ in the Quick Styles tab. For additional help using Word, consult the Microsoft website.

Preparing for the Training

As you know, preparation is the key to conducting an effective training. Here are some issues to consider:

Logistics

- *Advertise the training with enough advance notice that participants can block it out on their calendars. Consider contacting potential participants' managers to encourage their attendance.*
- *Send a confirmation notice before the training reminding participants of the date, time and location.*
- *Room setup: Ideally, use round tables to facilitate partner and small group interaction.*

Equipment and Supplies

In order for the training to go smoothly, have these supplies and equipment on hand:

▪ *Name tags*	▪ *Pads of sticky notes, blank paper*
▪ *Flip chart and markers, tape*	▪ *Pens or pencils*
▪ *Laptop with projector (for the PowerPoint)*	▪ *Beverages and snacks (optional)*
▪ *Timer or watch*	▪ *Water for yourself and the participants*

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

Contents

Module 1

Overview

Course Objectives

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

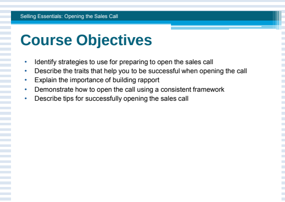
- *Identify strategies to use for preparing to open the sales call*
- *Describe the traits that help you to be successful when opening the call*
- *Explain the importance of building rapport*
- *Demonstrate how to open the call using a consistent framework*
- *Describe tips for successfully opening the sales call*

Trainer Notes

5 minutes

Introduce yourself and provide a brief background 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 electronics in use, show respect for every participant, participate fully, no dominating or interrupting, etc.



Review the course objectives with participants

The Sales Process

Opening the Initial Sales Call

Make Introductions

Make sure you know the names and roles of everyone in the meeting

(Limit time for small talk for today's busy customers!)

Confirm agenda

Bridge from how your got the meeting (referral, idea, etc.)

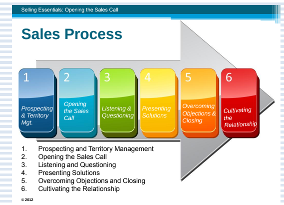
Confirm purpose of meeting and timing

Provide an overview of your company

Briefly describe a summary of what your company does and a mini case study (explain a challenge a customer faced, how you helped them, and the results the customer achieved.)

Trainer Notes

5 Minutes



Let's quickly review the sales process. First, you spend time prospecting and identifying qualified leads. Next, do your homework and convince the prospect to meet with you. Now, you are about to meet face-to-face with this prospect.

This step, Opening the Sales Call, is about making a good first impression, positioning yourself as an expert and setting a positive tone for potentially doing business.

As you get to know the prospect and ask questions to understand his needs, you will determine if there is a solution your company can provide to fit his needs. Once your present that solution, you may need to overcome objections and then you will close the deal.

Lastly, you will continue to cultivate on the relationship, and develop the client for life.

In this course, we will talk about opening the initial sales call and opening follow-up meetings. In both types of meetings, you will plan to open the call in a similar fashion.

In follow-up meetings, you will summarize what happened in the prior meeting, instead of making introductions. However, in some cases, there will be new decision makers who attend the meeting. In that case, you will summarize as well as Make Introductions.

A Paradox: The Importance of Rapport

Opening the Initial Sales Call

Make Introductions

Make sure you know the names and roles of everyone in the meeting

(Limit time for small talk for today's busy customers!)

Confirm agenda

Bridge from how your got the meeting (referral, idea, etc.)

Confirm purpose of meeting and timing

Provide an overview of your company

Briefly describe a summary of what your company does and a mini case study (explain a challenge a customer faced, how you helped them, and the results the customer achieved.)

Creative Ways to Build Rapport

- *Make small talk when the client walks them to the conference room*
- *Tag along to prepare, if offered a cup of coffee*
- *If a meeting participant needs to step out for a minute, and it is agreed not to continue the business conversation until he returns, use that time to build rapport with others in the room*
- *Pay attention to the prospect's office for signs of interests and hobbies and send an email to follow up on a topic of mutual interest*
- *Research them online and/or follow them on social media*
- *Follow their lead and if they make small talk, join in*

Activity: *List additional ways to build rapport with your prospects in light of the fact that their time is limited.*

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Trainer Notes

20 Minutes

Review the Opening the Initial Sales Call. Tell participant that the Opening is part the Framework for the initial sales call and we'll go over that in more detail later.

For now, the important concept is that busy customers want reps to focus on Making introductions, Confirming the agenda and Providing an overview of your company. That format allows little time for making "small talk" or building rapport.

As we discussed, it makes sense to be at our best and in our flow state as we open the call. We are told to engage the customer and to be sincere. However, as you see, in the opening, we are told to keep the introductions brief and that there is no time for small talk. There is a contradiction! Review the Creative ways to build rapport. Lead a discussion about the importance of building rapport and its positive impact on the sales process. Discuss the limitation of time for today's customer and how it affects you, the salesperson and how it affects the decision maker. Activity: Review the instructions. Allow 10 minutes for the groups to discuss and create their lists. Debrief by having a spokesperson from each group share their list.

Framework for the Initial Sales Call

Opening

Make Introductions

- *Make sure you know the names and roles of everyone in the meeting*
- *Limit small talk for today's busy customers!*

Confirm agenda

- *Bridge from how your got the meeting (referral, idea, etc.)*
- *Confirm purpose of meeting and timing*

Provide an overview of your company

Briefly describe a summary of what your company does and a mini case study (explain a challenge a customer faced, how you helped them, and the results the customer achieved.)

Shift to FOCUSING ON THE CUSTOMER

Listening and Questioning

Business discussion

- *Learn about the customer's problems and needs at a high level*
- *Identify questions beforehand to ask in the discussion*

Summarize

Test your understanding of what progressed in the meeting and what the next step should be

Advance to next step

Ask to advance to the next step

Activity

***Instructions:** Review the framework and identify how you will use it as you plan the **Opening** of your meeting with your prospects.*

Choose a spokesperson, who will share your top one or two best ideas.

Notes:

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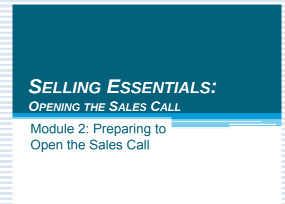
Trainer Notes

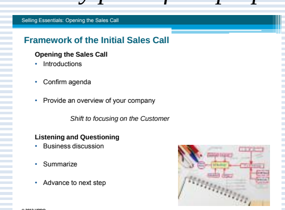
20 Minutes



Earlier we talked about the traits needed for successfully opening the call. Now we'll review the framework you should follow in order to be successful. You can see how the Opening fits in to the entire framework of the initial sales call.

Preparing for your opening involves planning, whether it is for opening the initial call or a follow-up call.

The framework for Initial Sales Call is a tool that will help you plan and to open the call confidently. Planning the agenda is a key part of the preparation.



Review the framework for the call. Reinforce that planning and ensuring that reps are knowledgeable about their company will help them lead a successful opening of the call.

Being knowledgeable about their company will help them to develop an overview that is suited to their prospect. Note that the majority of the time in the meeting will be spent learning about the customer in the business discussion.

Activity: Review the instructions for the group activity. Allow 10 minutes for the groups to share their ideas.

Debrief by asking each group to share their best ideas.

Encourage participants to take notes as they hear new ideas from other groups.

Confirm the Agenda

Agenda

- *Time*
- *Purpose*
- *Brief overview of my company*
- *Business discussion about your current situation and challenges*
- *Next Step and Summary*

Example:

Transition from Introductions:

"It's great to meet you all. I appreciate your time. I believe we set this up for 60 minutes. Does that still work for you? Good."

Confirm the Agenda:

"Here's what I'd like to do: I will get us started by taking two to three minutes to share an overview of my company, the issues we solve for buyers in your role and why they bring us in. I'll touch briefly on why we're different and keep gaining new clients. Then I'd like to ask you about your situation and how you're approaching the marketplace

Depending on what I hear from you, I'll share a couple of relevant case studies or show you a few options of how we provide our services.

After that we can discuss if it looks as if we might be a fit for you, or if there is a logical next step. Is there anything else you'd like to add to that?"

Activity:

Think of a prospect you will meet with soon. In your own words, write what you'll say when you are meeting with her to transition from the introductions and to confirming the agenda. Include all components of the agenda.

Transition from Introductions:

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Confirm Agenda:

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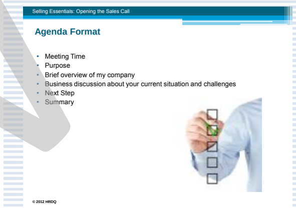
Trainer Notes

20 Minutes

Before the meeting, you communicated with your prospect and sent a copy of your agenda.

Now, when you are with the prospect, opening the sales call, it is important to confirm the agenda.



Review the model of the Agenda and the example of communicating the agenda in a sales call. Note how the example includes each bullet point from the Agenda model.

Stress the importance of knowing your agenda. It shouldn't be memorized or sound canned, but you should know it well enough that you can relate it confidently and in your own words.

Activity. Review the instructions. Allow 10 minutes for participants to write their transition statement and what they will say to confirm the agenda. Make sure all components from the agenda format are addressed in your transition and in confirming the agenda.

After 10 minutes, assign each participant a partner.

Have Partner A review Partner B's work first. Allow 5 minutes.

Have them ensure that each component of the agenda format is included. Reverse roles.

Initiate a short debrief discussion to draw out key learning points. Ask questions including, "What did you learn from doing this activity?" "What was challenging?" "How will this help you on the job?"

The Company Overview

Example 1: Creative Options Software Company

Summary

Creative Options Software Company provides alternatives to companies who are cutting back on their software licenses. We have seen how much the economy is impacting firms like yours. That's why we've been focusing on helping companies in your market segment, the financial industry.

Mini Case Study

We have found that many companies are paying too much for their software licenses – especially since there have been so many downsizings and internal changes.

We did an audit for one of our customers, a major financial company. They didn't realize how much money they were wasting on unused software licenses. We have been able to cut their expenses by 21 percent in the first year. They just signed with us for another year.

Example 2: Food Equipment Cleaning Corporation

Summary

The Food Equipment Cleaning Corporation provides solutions for cleaning equipment used in manufacturing plants.

Mini Case Study

Our customer, a yogurt packaging plant, was experiencing decreased productivity and performance in equipment due to the cleaning process.

We did an analysis and found that by switching to our patented detergent, they would reduce the temperature of the cleaning process, reduce energy consumption and eliminate water temperature problems. This reduced the environmental impact and improved the performance of rubber parts on the equipment.

Trainer Notes

5 Minutes

There is much information to relay to the prospect. Stress the importance of using this format to organize that information clearly and succinctly. You want to make it easy for prospects to understand what your company does and how you can help. When you talk in terms of the prospect's interests, they listen and are open to your ideas.

When possible, craft your overview so it relates to the prospect's specific industry and/or situation.

Review the components of the overview and the example.

Here are two examples of company overviews. The overview consists of a summary of what your company does and a mini-case study (explain a challenge a customer faced, how you helped him and the results the customer achieved.)

Remember, the main goal of providing a company overview at this point is to make an impact and to establish yourself as an expert. You simply want get their attention and buy-in to open the door for a two-sided business conversation later in the meeting. This is not a presentation, it's an encapsulation!

Thinking On Your Feet

Adapting to Meet Customer Expectations

Sometimes prospects will listen politely and are interested in what we have to say when we open the call. We follow the steps by making introductions, confirming the agenda and providing an overview of our company and the potential customer listens with great interest.

Once in a while, you may get an extremely busy or a "gruff" prospect. He may snarl something to the effect of "I only have 10 minutes" or "Just show me what you've got" or "You don't need to understand my business."

You may have to put your agenda aside momentarily and summarize your value. This will help you to establish credibility; you can get back on track later. Usually, once prospects hear that you have expertise in their field and have helped customers similar to them; they lower their defenses and will give you more time for a business conversation.

On the other hand, some customers may be so eager to find a solution to their problem, that they may interrupt your opening and start discussing their business problems.

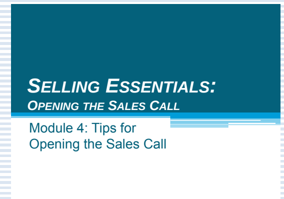
In either case, you have to think on your feet and adapt accordingly. The steps for Opening the Call is a format that is meant to help you prepare and to guide you on the call. You need to judge when it makes sense to deviate from it in order to meet your customer's expectations.

"Action and reaction, ebb and flow, trial and error, change – this is the rhythm of living. Out of our over-confidence, fear; out of our fear, clearer vision, fresh hope. And out of hope, progress."

Bruce Barton

Trainer Notes

10 Minutes



As you open sales calls, you may find that some customers follow politely with what you suggest. Others may challenge you and have other expectations.

Allow participants a few minutes to read the participant guide, "Adapting to Meet Customer Expectations."

Lead a brief discussion about the reading. Point out that they will encounter many different situations with different personalities and there are no easy answers on how to react. They will learn through trial and error as they experience different situations.

Be Prepared to Talk About Business

Example: Making a Change

	Description of Problem
It's OK.	*Perhaps I should stop smoking.*
It's a Problem.	*The tobacco is staining my teeth.*
The problem is growing.	*Nobody likes the smell of smoke and my family continues to beg me to stop smoking.*
I need to make a change.	*My doctor told me I should quit and I want to be around for my family!*

Example: Telecommunications

Customer's Thoughts on Making a Change	Description of Problem
It's OK.	*Some users complained about static on the line while using this telecommunication service.*
It's a Problem.	*There was a price increase. However, it still doesn't seem worth the trouble to make a change in vendors.*
The problem is growing.	*More users are complaining about the static on the line, and there have been billing errors.*
I need to make a change.	*Customers complained because they couldn't get through on the toll free line.*

Activity

Instructions: *Think of a prospect you will be calling on. What are potential needs she may have? Describe the stages as it may progress:*

*It's OK*____

____

It's a problem ______________________________________

____

The problem is growing ______________________________

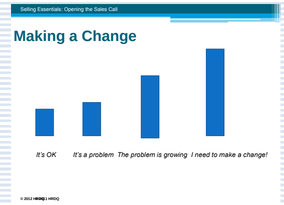
____

I need to make a change _____________________________

____

Trainer Notes

15 Minutes



As we discussed, there may be some cases when you are opening the call and your prospect wants to jump ahead to the business conversation.

Even though our intent is to open the sales call, we have to be prepared to switch gears. As noted, it is important to anticipate the prospect's needs and be prepared to discuss business and their needs.

Customers are often hesitant to make a change. As depicted in the graphic, when a customer has a small need, he is not likely to make a change. As the need grows and becomes more problematic, he is more likely to make a change.

Review the examples in the charts.

The ability to uncover the customer's needs is the foundation of your success in sales. Before meeting with the client, try to anticipate their business needs and problems.

Having an idea of their potential needs makes you more confident and prepared when you open the call and meet with them for the first time.

Activity: Review the instructions. Allow 5 minutes for participants to identify a prospect's potential need. Debrief by asking one or two participants to share their examples.

Course Review

1. *List at least two traits that successful sales people display when opening the sales call.*

2. *Describe at least two expectations that customers have, and what it takes for you to make an impact so they will do business with you.*

3. *Which is the correct sequence for Opening the Sales Call?*

   a. Build Rapport, Introductions, Confirm agenda

   b. Build Rapport, Introductions, Provide an overview of your company

   c. Introductions, Confirm agenda, Provide an overview of your company

   d. Introductions, Confirm agenda, Ask Questions

4. *Before opening the sales call, you must prepare and review the tools you used in the Prospecting phase. True or False?*

5. *Anticipating prospects' business needs will help you build confidence as you open the call. True or False?*

Answers

1. Confident, sincere, engaging

2. She expects you to understand her current situation, to probe and uncover needs and bring root causes out in the open and to identify alternative options or solutions to fit her needs

3. c

4. True

5. True

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