REPRODUCIBLE TRAINING LIBRARY
Customizable Soft-Skills Courseware

Selling Essentials: Understanding the Sales Cycle

Instructor Guide

Published by HRDQ

Authorized distributor Dekon Business Solutions

Phone: 0040 734 350 525

Web: www.dekon.biz

ISBN 978-1-58854-718-7

2710E1SEUSC

EN-01-MY-13

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 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 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 into each course to appeal to all learning styles and ensure that the ideas and information will be retained.

Instructional Design and Learning Philosophy (cont.)

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 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

To ensure that the training goes smoothly, have these supplies and equipment on hand:

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

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

Contents

Module One

Assessing Your Sales Savvy

Course Objectives

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

- *Assess your strengths and areas for improvement*
- *Describe customer-focused selling*
- *State trends in today's selling environment*
- *Explain the steps in the customer buying cycle*
- *Describe the customer's decision-making process*
- *Describe the steps in the sales process*

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.

NOTE: Ask this question before you move on to the next slide:
"How do you define ASSESSMENT?"

Allow a few participants to share their definitions.

Purpose of the Assessment

Establish a Baseline

- *Accept your unique qualities.*
- *Realize that this is a starting point.*
- *The baseline provides a fresh look at your current situation.*
- *It provides opportunities for your growth.*

Get a Perspective

- *Accept your strengths and weaknesses.*
- *Set a context for setting goals.*
- *Provide inspiration for improvement.*

Put a Plan in Place

- *Revisit your assessment at regular intervals after the program.*
- *Set goals.*
- *Apply the skills you learned in the program.*
- *Reach your goals!*
- *Meet with your manager to set new goals.*

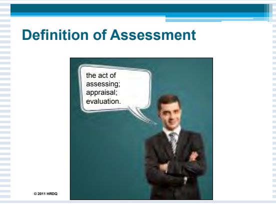
> *"My great concern is not whether you have failed, but whether you are content with your failure."*
>
> *Abraham Lincoln*

Remind participants of the importance of being frank and honest with themselves in completing this assessment. It will help them to see progress and to achieve their goals if they have a baseline of their skills. Remind them that it doesn't matter if they rate high or low: the assessment will benefit them most if they assess themselves accurately and fairly.

Tell them that their insights from the assessment will help them in their action planning to achieve goals after the course.

Trainer Notes

5 minutes



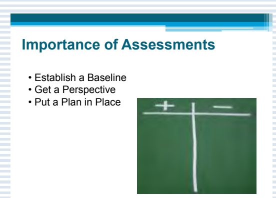
The definition on the slide is from the dictionary. By assessing our sales savvy and areas for improvement, we are taking an honest look at our abilities as salespeople.

Ask: Why is it important to assess our skills?

Potential answers: We have to take a look at where we are and where we want to be, in terms of our skill levels. In order to grow professionally so we can better serve our customers, we have to fill that gap between where we want to be and where we are.

When our skills improve, our customer service satisfaction levels grow and our revenues and compensation will grow as well.

Review the purpose of the assessment.



Sales Self-Assessment

Activity

Instructions: *Reflect on your experience and skills. Be honest with yourself as you assess your skills. Read each of the following statements, and write the number that applies:*

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

I am aware of the latest trends in today's competitive business world.	
My sales efforts go into qualified prospects only.	
I can identify the key qualities of a successful salesperson.	
I can explain the value of using a sales process.	
I am knowledgeable about customers' decision-making processes.	
I am aware of customers' motivations to buy products and services.	
I am adept at building long-term relationships with my customers.	
I ensure that everyone in my company delivers excellent customer service to my customers before, during, and after the sale.	
I utilize a model for efficiently opening a sales call.	
I can transition a sales call from establishing a friendly rapport to capturing the prospect or customer's business interest.	
I listen more and talk less while I am on a sales call.	
I utilize questioning skills to uncover customers' needs and challenges.	
I understand the different types of needs that customers have.	
I only present a solution after fully understanding the customer's needs.	
When I identify a solution for the customer, I present it in clear and simple terms—what's in it for the customer?	
I use a model to overcome the customer's objections.	
I am skilled at knowing how and when to close a sale.	
I have expertise in cultivating and capitalizing on client relationships.	
I fully comprehend the customer's industry and competitive challenges.	
My customers perceive me as a leader in my industry and come to me for expert advice.	

Trainer Notes

20 minutes

Activity: Allow about 10 minutes for participants to complete their self-assessments.

Tell them that only after completing this page should they move on to the next page.

Tell participants to take their time and that no one should feel rushed.

Once everyone has finished and has put their pens down, tell them to turn the page. You will walk through the instructions together.

(Continued on next page.)

When You Were Sold

Instructions: *Discuss the following two topics. Take off your "salesperson hat" and think of two times when you made a purchase. Think of one* **positive** *experience and one* **negative** *experience. Discuss and record your ideas.*

Sold Well

1. *First, think of a positive experience when you were "sold well." After you walked out of the store, or after the salesperson left, how did you feel?*

   What was this experience like?

   What did the salesperson do or say to make you feel good about the process?

   Would you return there? Would you refer the salesperson or the store?

Sold Poorly

2. *Next, think of a negative experience when you were not "sold well"—and you walked out of the store and did not feel good. Perhaps you even felt annoyed. In your group, discuss and record your thoughts and ideas.*

   What was that experience like?

What did the salesperson do or say to make you feel poorly about the process?

Would you return there? Would you refer the salesperson or the store?

"What other qualities came up in your discussions that describe a salesperson who sold well?"

Note: During the discussion, list the descriptions of salespeople who sold well on a flip chart.

List all the qualities that participants state on the flip chart and post in a prominent place to refer to later in the session.

Next, let's talk about how you can become successful salespeople in today's competitive business world.

Trainer Notes

15 minutes

Activity: The purpose of this activity is get participants to think of sales from the customer's point of view and to build a foundation for the program.

Have participants work in pairs.

Allow 10 minutes total for them to discuss a time when they were sold well and sold poorly.

Review instructions. Participants will first discuss a time when they were "sold well."

First, allow 5 minutes for them to identify their sample situations.

Next, allow 5 minutes for the "Sold Well" discussion. (Each partner in the pair will get about 2–3 minutes to share their experience.) Call time after 5 minutes. Tell participants to complete the "Sold Well" conversation and to move on to the "Sold Poorly" conversation.

Allow 5 minutes total for the "Sold Poorly" discussion. Call time.

Lead a short debriefing discussion. Ask, "What insights did you uncover in your discussions?"

Draw out the ramifications from both selling well and selling poorly.

Why Customers Buy

Pain

Problems customers have

Gain

Opportunities to improve upon a situation

Change is challenging!

Today's customers are frazzled and overworked, and don't have enough hours in the day. They are risk-averse and hesitant to make changes that might cause problems or bring on more work.

As their needs grow, customers realize that they must make a change.

It's OK.	*"I could lose a few pounds, but I'm probably OK."*
It's a problem.	*"My slacks are feeling are a little hard to button, but they aren't uncomfortable."*
The problem is growing.	*"My slacks are uncomfortable and bothering me very much!"*
I need to make a change!	*"I can't squeeze into my pants anymore. I have to find something else to wear!"*

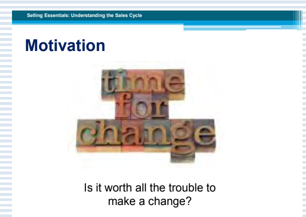
"The world hates change, yet it is the only thing that has brought progress."
Charles Kettering

Trainer Notes

15 minutes

It's been said that buying decisions are based on emotions. Let's look at the process of how buying decisions take place. Why do customers buy?

Before a customer decides to buy a certain product, there has to be a reason to make a change. There may be a problem causing pain or frustration, or an area in which he wants to see improvement.



We can understand that customers may question whether it is worth making a change that may bring on more work or cause a potential problem, or even be a negative career move.

The Customer Buying Cycle

Awareness of Needs

- *Customer becomes aware of his needs.*
- *Customer recognizes that her needs and problems are growing.*
- *Customer comes to terms with the fact that significant problems exist and that he must take action.*

Research of Options

- *Customer does the necessary research to find the best fit for her product.*
- *Customer considers several vendors who have expertise in the industry.*
- *Customer narrows the search to a few companies who seem to have a fitting solution for his exact needs.*

Decision to Purchase

- *Customer makes the decision to purchase the product.*
- *Customer identifies a single vendor who is the best fit to solve his problem, address his specific needs, and bring the most value.*

Implementation of Product/Service

- *Customer installs and uses the product/service.*
- *Customer will form an opinion on whether to use this vendor again, based on this experience and the service she received from the company.*
- *As time goes on and other needs arise, the customer may or may not call on this vendor for another product.*

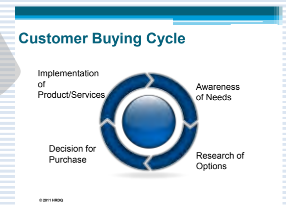
> *"Make your product easier to buy than your competition, or you will find your customers buying from them, not you."*
>
> Mark Cuban

Trainer Notes

5 minutes

Understanding your customers' individual needs is important. It is also important to understand their needs as a whole.

Your understanding of this process, or cycle, will assist you in building your relationships with your customers.



Review each phase as described in the participant guide.

Notice that the cycle is ongoing. It doesn't stop at implementation. The implementation phase is an important phase that many salespeople overlook; it is not the last phase! Time should be spent building the relationship and upselling. However, many salespeople don't understand the value of time spent here.

Understanding each phase and putting a strategic plan in place to address each of them will help you to become a more efficient salesperson.

Most important, understanding your customer and her unique business needs and helping her feel comfortable through each phase will bring you great success.

Overview of the Sales Process

Sales Process

- *Prospecting and territory management*
- *Opening the sales call*
- *Listening and questioning*
- *Presenting solutions*
- *Overcoming objections and closing*
- *Cultivating the relationship*

Trainer Notes

5 minutes

Ask, "Who knows what a sales process is?"

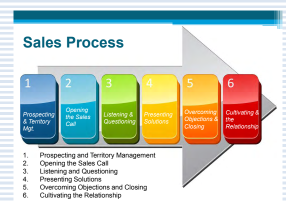
Allow a few volunteers to share their answers.

Show the Definition slide and review it.

"Why is it important to have a sales process?"

Allow a few volunteers to answer. (The sales process is a road map that provides direction to help us in planning to reach our goals.)

Show the sales process. Review each phase.



The sales process helps us stay on track. That's one way to ensure success. Another way to ensure success is to use certain "success skills" when we are with our customers. We know that successful sales people have certain traits.

Prospecting and Territory Management

Getting the Customer's Attention

Activity: *If you were a customer, which salesperson would you meet with and why? Identify the customer-focused elements that you see.*

1. Dear Prospect,

I'm Tony with Major Media. We are number one in our field. Our customers voted us #1 and that speaks volumes about the work we do. We are confident about being able to help you as well. I'd like to get started as soon as possible so we can help you be successful too!

Tony

2. Dear Prospect,

I'm Tamara with Major Media. We help businesses like yours increase their revenue streams.

I have had many successes with customers in your field. I'd like the chance to meet with you to learn more about what you do. I think I might be able to add value and provide some insightful ideas. Now, I can only imagine how busy you are so I promise I won't waste your time. If you give me the opportunity to meet with you, I will listen carefully to what you have to say.

Since we specialize in helping firms in your industry, I believe we may be able to help you as well.

Tamara

He is probably sincere, but comes across as bragging about his company and products with nothing to back it up. His letter is simply "fluff." There is no substance or proof of prior success. The customer will ignore the letter or delete the email.

Tamara starts her letter with substance. She immediately begins with a customer focus and WIIFM (What's In It For Me.) "Increase revenue streams" will grab the customer's attention. It is something the customer will have interest in learning more about.

Tamara is sincere and promises to listen carefully and to offer her insights. She reiterates that her company specializes in the customer's field to gain credibility.

Trainer Notes

15 minutes

In the Prospecting and Territory Management module, you will learn a great deal about these issues.

You'll look at developing a prequalified, prioritized prospect list, creating a plan for speaking to prospects and getting appointments, and identifying best practices for analyzing and segmenting your territory.

Today, we'll spend time thinking about best practices for getting the appointment.

Activity: In your group, read each message and indicate which one you'd meet with if you were a busy buyer.

Allow 10 minutes for the participants to read the letters and discuss them in their groups.

Debrief by leading a conversation to draw out customer-focused qualities.

Tony simply talks from his own perspective; he doesn't try to position his letter from the customer's standpoint.

Cultivating the Relationship

Provide Value and Build Credibility

Maintain high exposure during the initial implementation of the product.

- *Relentlessly ensure customer satisfaction.*
- *Be committed to doing whatever it takes to honor your word to your customer.*

Plan a strategy for staying in contact with your customer and continue to be familiar with news and trends in their world.

- *Use your creativity and expertise to find a reason to stay in contact with your customer. (Be sure to provide value—don't just check in to say hello.)*
- *Continue to read about the industry and competitive trends.*
- *Research and examine every part of their organization—set up Google alerts for the company name, executives, and related agencies to ensure that you stay on top of industry news and know what remains important to them.*
- *Keep abreast of the customer's vision, who they are, and what they stand for. Reference this in conversations and communications when appropriate.*

> *"Action without planning is the cause of all failure. Action with planning is the cause of all success."*
> *Brian Tracy*

Trainer Notes

5 minutes

Follow up with your customer after the sale to cultivate the business relationship and to capitalize on the next business opportunity. Stay in touch, but don't overdo it or "stalk" the customer.

Review tips for providing value and building credibility as you cultivate the relationship.

Maintain high exposure during the initial implementation of the product. Plan a strategy for staying in contact with your customer and continue to be familiar with news and trends in their world. Even if you never get more business, you'll have the satisfaction of having pride in yourself and your work—and you may even get a referral!

Course Review

1. *Name at least two golden rules of customer-focused selling.*

   ____
   ____
   ____

2. *List at least two ever-changing factors in today's selling environment.*

   ____
   ____
   ____
   ____

3. *Which of the following is NOT a step in the customer buying cycle?*

   a. Awareness of needs

   b. Implementation of products/services

   c. Presenting the solution

   d. Researching options

4. *The decision to purchase entails gathering proposals and identifying the best solutions/vendor. True or False?*

5. *Pain and gain are key motivators for customer buying. True or False?*

Trainer Notes

1. Use the customer's WIIFM as your point of view; gain permission to advance the sale; get the customer to buy into the decision.

2. Customers, politics, technology, economy.

3. c.

4. True.

5. True.

What our Clients Say about the Reproducible Training Library

I have used many of the *Reproducible Training* programs and I can't say enough good things about them. The content is easy to tailor—I've even combined programs to meet my clients' specific needs. Not only am I able to provide my clients with a professionally developed, customized program at a reasonable price, but I've saved myself a lot of time and frustration, too. I plan to buy more programs in the future. I highly recommend them!

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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