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Customizable Soft-Skills Courseware

Selling Essentials:
What to Ask & How to Listen

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 between the topic and participants' past, present, and future*
- *Appropriate organization of essential ideas helps participants 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 participants immediately apply what they have learned to a real-life situation*
- *Consistent instructions and design help participants 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 with 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

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

Name tags	*Flip chart paper*
Flip chart and markers, tape	*Water for yourself and the participants*
Laptop with projector (for the PowerPoint)	*Timer or watch*
Blank paper and pens, sticky notes	*Beverages and snacks (optional)*

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

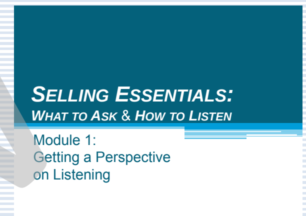
Contents

Module 1

Getting a Perspective on Listening

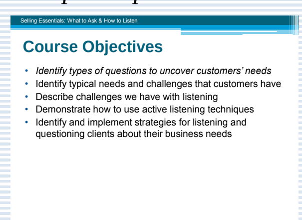
Trainer Notes

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 use of electronics, showing respect for every participant, participating fully, no dominating or interrupting, etc.

Review the course objectives with participants.



Course Objectives

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

- *Identify types of questions to uncover customers' needs*
- *Identify typical needs and challenges that customers have*
- *Describe challenges we have with listening*
- *Demonstrate how to use active listening techniques*
- *Identify and implement strategies for listening and questioning clients about their business needs*

How Does Listening Fit In?

Framework of the Initial Sales Call

Opening the Sales Call

Make introductions

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

Limited time for small talk for today's busy customers!

Confirm agenda

Explain how you got the meeting (referral, idea, etc.)

Confirm purpose of meeting and timing

Provide an overview of your company

Briefly describe what your company does and a relevant mini-case study (explain a challenge that 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

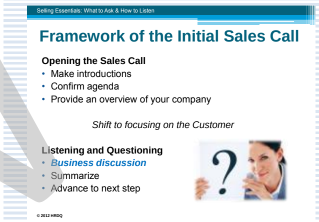
Ask to advance to the next step

Trainer Notes

5 Minutes

"Let's talk specifically about how listening fits into the initial sales call."

Have participants take a couple of minutes to read the framework of the sales call.



Point out that this format remains constant even after the initial sales call. You won't have to make introductions or provide an overview of your company after the first meeting. Otherwise, you can follow the framework for subsequent sales calls.

Note that listening and questioning take place after we open the call.

"After the introductions and overview of your company, you shift the focus away from your company and toward the customer."

"It is here where we lead the business discussion and ask questions in an attempt to learn about the customer's problems and needs."

Stress the importance of anticipating needs and planning questions beforehand in order to maximize time with the prospect. Participants should plan ahead and identify questions to ask that anticipate the prospect's needs.

Remind participants they should follow the Pareto Law: 80/20. They should listen 80% of the time, and talk/ask questions 20%.

Understanding Customer Needs and Problems

Making a Change

Example

Need/Problem area: Equipment productivity

It's OK: *Equipment runs well.*

It's a problem: *Equipment breaks down occasionally.*

The problem is growing: *Equipment breaks down often.*

We need to make a change: *Equipment breaks down too often and is hurting productivity.*

Activity:
In your group, identify an area where one of your customers has a need and work together to describe each phase of the need/problem.

Need/Problem area:

It's OK:

It's a problem:

The problem is growing:

We need to make a change:

"We cannot solve our problems with the same thinking we used when we created them."

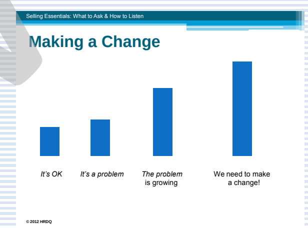
—Albert Einstein

Trainer Notes

15 Minutes

"Customers in today's busy world find that making a change can be difficult."

"Making any change is difficult, whether we're trying to lose a few pounds or quit smoking. Until we're really motivated or really feel the pain, it's difficult to make a change."



"We typically don't make a change until we have to. This is human nature and is especially true for today's busy customers."

Review the example in the Participant Guide of how a problem with equipment grows.

Activity: Review the instructions. Allow 5 minutes for the groups to identify a problem and describe each phase of the problem.

Debrief by having a spokesperson from each group share their example.

Types of Questions

There are two types of questions: Closed and open-ended questions.

Closed questions *elicit short answers (one or two words). They provide a yes or no answer, give you facts, and are easy for the prospect to answer. The benefit of asking closed questions is saving time when you need information quickly.*

- *"Do you need this shipped in lots of 100?"*
- *"When would you like it delivered?"*

Open-ended questions *require longer answers that get the prospect to open up and elaborate. They develop trust, are less threatening, and allow a free response that may reveal other hidden needs or feelings. They enable you to control the conversation. Another benefit of asking open-ended questions is learning about the customer's expectations, so you don't make incorrect assumptions in understanding their needs.*

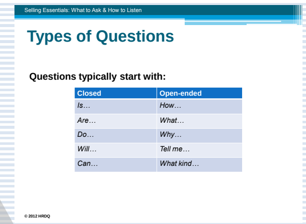
- *"When does this problem occur?"*
- *"How do you use the report?"*

Type of Question	*Typically starts with:*
Closed	• *Is…* • *Are…* • *Do…* • *Will…* • *Can…*
Open-ended	• *How…* • *What…* • *Why…* • *Tell me…* • *What kind…*

Trainer Notes

20 Minutes

Review types of questions: closed and open-ended questions.



Activity: Review the instructions.

This exercise focuses on closed questions. Assign each participant a 3x5 card (see Appendix/Handout file) with a name on it. Instruct each person to use tape or a safety pin to attach the card to another person's back. They should not divulge the name on the card.

Tell them that they can ask 1 closed question (for example, "Am I female?") to one person and then they should move on to another person. They are to continue this process until they discover who they are by asking closed questions.

After a few minutes, stop the activity. Ask if anyone has uncovered who they are.

(Very few, if any, will have uncovered who they are.)

Next, ask participants to create an open-ended question that will help to uncover who they are.

Allow a few minutes for them to ask open-ended questions to uncover who they are.

Debrief by discussing how frustrating it was to be asking only closed questions.

Ask: "What was the activity like when you asked closed questions?"

(continued on next pg)

Active Listening

Listen

- *Use open and inviting body language, lean forward*
- *Make eye contact*
- *Focus, don't be distracted*
- *"Read" the speaker's body language*

Empathize

- *Ask questions to clarify*
- *Encourage the speaker to continue with:*
  - *verbal comments like, "Oh" and "I see"*
  - *non-verbal actions like smiles and appropriate facial expressions*

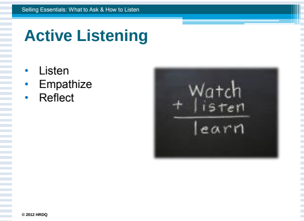
Reflect

- *Paraphrase what the speaker is thinking or feeling*

> *"Business people need to listen at least as much as they need to talk. Too many people fail to realize that real communication goes in both directions."*
>
> *—Lee Iacocca*
> *Former CEO Chrysler Corporation*

Trainer Notes

10 Minutes



"Actively engaging in the listening process enables you to understand the emotions, expectations, and desires another expresses. Have you ever noticed that while it is easy to hear the words another is speaking, it is often challenging to understand what she is really saying?"

Review the key points of Active Listening: Listen, Empathize, and Reflect. Ask: "How can you show that you are actively listening?"

"We know active listening is important, we know what it looks like, and we also know it is not always done well."

Ask: "What gets in the way—what makes active listening difficult?" If the group's responses do not include personal (internal) distractions, ask the group if such distractions exist. Emphasize that sometimes our own internal distractions can make it difficult to listen.

To illustrate how distractions can interfere with effective listening, tell participants to close their eyes, sit silently, and just listen for 1 minute. (Note to instructor: Nothing will be said during this period; typical "unnoticed noises" will be more pronounced in this period of silence.)

Debrief: Ask participants to share what they heard as they listened, both outside and within themselves.

Summarize by pointing out that there are many distractions that get in the way of our ability to listen. Building positive customer relationships requires us to focus our listening activities so we can truly understand our customer's needs.

Listening with Both Ears

Activity:

Speaker: Choose a topic you are passionate about and talk about it for 5 minutes.

Listener: Use Active Listening (Listen, Empathize, and Reflect) to understand what the speaker is saying.

Observer: Observe the person who is actively listening and use his or her Participant Guide to take notes. Then, lead a debrief discussion to review the use of active listening skills. Observers should summarize the strengths and provide one area for improvement.

Observation Checklist

Listener Name:

	Observation	*Additional Comments*
Listen	☐ *Uses open and inviting body language, leans forward* ☐ *Makes eye contact* ☐ *Focuses, is not distracted* ☐ *"Reads" the speaker's body language*	
Empathize	☐ *Asks questions to clarify* ☐ *Encourages the speaker to continue with:* ☐ *verbal comments like, "Oh" and "I see"* ☐ *non-verbal actions like smiles and appropriate facial expressions*	
Reflect	☐ *Paraphrases what the speaker is thinking or feeling*	

Strengths

Area for Improvement

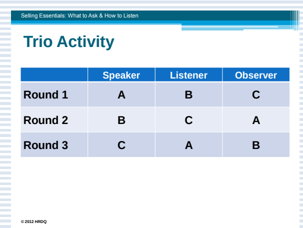
Trainer Notes

30 Minutes

"We will participate in a trio role play activity. You will work in groups of three. One person will be the speaker, one will be the listener, who will use active listening skills, and the third person will be the observer. The observer will use the checklist to note the active listening skills that are used."

"We will rotate, so each person in the trio will have the opportunity to play each role. Please determine who will be Person A, Person B, and Person C in each trio."

Review the role of each person.



Review the order of who will play which role and note that there will be three rounds.

Allow approximately 5 minutes for each speaker to talk about their topic. Allow 5 minutes for the observer to review the feedback on the Observation Checklist.

Repeat for three rounds.

Preparing for Your Business Discussion

As you prepare for your business discussion, determine what you'd like to discuss. Now, put yourself in your prospect's shoes. What do you think is on his mind? Can you find out anything ahead of time, to save time?

A customer expects you to:

Understand his current situation

Ask:

- *What are your role/responsibilities?*
- *What are your business objectives?*
- *What are you doing to achieve those objectives?*

Probe and uncover known or unknown needs and bring the root causes into the open

Ask:

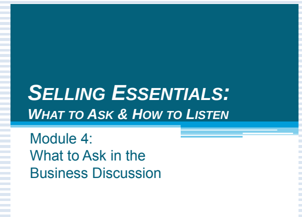
- *What challenges are you facing in reaching goals?*
  - *Please describe those challenges/situations.*
  - *Who else is involved in those types of interactions?*
- *What are the reasons for staying with your current vendor? What would cause you to make a change and consider another vendor?*

Identify alternative options or solutions to fit his needs

- *Identify which product(s)/service(s) may fit your prospect's needs.*

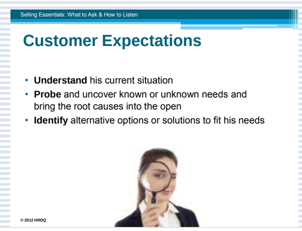
Trainer Notes

5 Minutes



"Today's customers are busy and overwhelmed. When they take time out of their busy schedules to meet with you, be sure to maximize your time and theirs!"

"Don't waste time asking questions that you could have learned about on your own or by looking on their website. (What does your company do? Which products are the best sellers? How long have you been in business?)"



"As you prepare for the business conversation, keep the customer's expectations in mind and put yourself in the role of the detective so you can begin to uncover his needs."

"Anticipate what his needs might be and develop questions that you may ask during the business conversation."

"Envision your role as a detective. Spend your valuable time asking questions about your prospect's role and try to understand his specific situation. Once you uncover a need, then you can identify a solution to fit the specific need. That's where your value comes in!"

Strategies for Questioning

Activity:

Create your own Questioning Strategy to uncover customers' needs.

Step 1
Think about the customer objectives that your company's products and services can satisfy. List them in the first column.

Step 2
In the second column, list questions to ask to uncover customer needs. Create at least two open-ended questions and one thought-provoking question.

Step 3
In the third column, indicate the product(s) or service(s) that may meet each need.

Objectives	Questions	Product/Service
Example: *To increase productivity*	***Open-ended questions:*** • *How are your productivity numbers?* • *What is working well?* • *What are you having challenges with?* • *Why do you think that is happening?* ***Thought-provoking question:*** • *In a perfect world, what would have to happen to give you the productivity you want?*	*Productivity widget*

Objectives	Questions	Product/Service
	Open-ended questions: ***Thought-provoking question:***	

Trainer Notes

20 Minutes

Allow 10 minutes for participants to work individually to create 2-3 open-ended questions and 1 thought-provoking question that they will ask a prospect in a conversation to draw out a need.

Next have participants work in pairs so they can review and give feedback on their partner's Personal Questioning Strategy.

Remind them to consider: Are the questions open-ended? Does the thought-provoking question give pause for thought and reflection or ask an opinion or evaluation of an idea?

Remind participants to keep their Questioning Strategy handy (on their desktop, by their desk) and use it to uncover customers' needs.

Course Review

1. *List the two basic types of questions.*

   ____

   ____

2. *List two qualities of a thought-provoking question.*

   ____

   ____

   ____

   ____

3. *Which of the following is NOT an important aspect of questioning?*

   a. questioning positions you as an expert

   b. questioning helps you uncover the prospect's needs

   c. questioning sparks interest and drives the conversation

   d. questioning gives you time to gather your thoughts

4. *We have the ability to process more words than we usually hear? True or False?*

5. *A large percent of the meaning of a message comes from the words in the message. True or False?*

1. *Open-ended and closed questions*
2. *They give pause for thought and reflection or ask an opinion or evaluation of an idea.*
3. *d*
4. *True*
5. *False; body language impacts the meaning of a message more than the actual words.*

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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