

**Up-a-Notch™ Sales Training
System
for Inside Salespeople
By Dave Kahle**

Basic Telephone Techniques

FACILITATOR'S GUIDE

Congratulations, you are going to facilitate this training session.

Your job includes these things:

- facilitate the group conversations
- support and encourage each member
- manage the details of the program
- help hold people accountable for doing their assignments

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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...

Prepare for the session:

- ___ Make sure you have a working video player and monitor, or as a less desirable option, an audio cassette player.
- ___ Obtain an easel or white board.
- ___ Prepare one set of materials for each of the participants.

- ✓ 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.
- ✓ Make sure you have one “participant’s manual” for each person involved in the training. Order additional manuals from The DaCo Corporation, 1-800-331-1287.
- ✓ 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.

During the training session:

_____ 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 Basic Telephone Techniques. 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: Role-play “Attitude”***

- ✓ Give everyone a few moments to read the directions.

This is a role-playing exercise. The learning value of the exercise is not the role-playing itself, but rather the discussion of it, which follows. Your job will be to select a couple of people to role-play each of the attitudes listed

below, and then to lead the discussion of the role-play which follows. We've included more attitudes to role-play than we realistically expect you to do. Select those that you think are most appropriate for your company, and end the role-playing exercise when you think the learning value from it has been achieved.

- ✓ When you and the participants are ready, say this:

“We are now going to role-play some situations. I'll need a couple of volunteers for each of these role-playing situations. We will take turns doing several role-plays so that almost everyone will be involved. When you are in the role-play, try to be as realistic as possible. When you watching the role-play, pay attention to the questions in your manual, and make some notes. We will be discussing each immediately after the role-play.”

- ✓ Pick two people to role-play a situation. One should be a typical customer, the other should be a Customer Service Representative. The two people can remain at their seats while they role-play.

Here is the first situation:

A customer is going to call and ask a couple of normal, everyday questions. The Customer Service Representative is going to project an attitude of impatience and irritation.

Give both role-players a moment or two to collect their thoughts and mentally prepare. While they are doing so, instruct the other participants to read through the questions in Exercise One, and be prepared to share their responses.

When everyone is ready, ask the two players to begin. After a few moments, call an end, and then ask each of the Exercise One questions. Get some discussion on each question.

- ✓ Repeat the role-playing exercise with different people. Each time, instruct the Customer Service Representative to project a different attitude (use the list below). Instruct the participants to respond to each of the questions for each role-play.

- ✓ Attitudes to Project

Patronizing
Tired
Warm & Friendly

Disgruntled
Professional

Exercise Two: Role-playing - Response

- ✓ Continue with the role-playing, this time focus on the Customer Service Representative's **response** to a customer. Instruct the person playing the role of the customer to act in the way listed below. Instruct the person playing the

role of the Customer Service Representative to respond appropriately. Instruct everyone else to answer the question listed in Exercise Two.

Situation #1:	Customer is irate
Situation #2:	Customer is pressed for time
Situation #3:	Customer is cold & detached

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.

EVALUATION

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

Program 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.

- | | |
|--|--|
| <input type="checkbox"/> No one acted on their prescriptions
<input type="checkbox"/> A couple of people acted on their prescriptions.
<input type="checkbox"/> Most attempted to complete their prescriptions.
<input type="checkbox"/> Everyone acted on their prescriptions.
<input type="checkbox"/> Everyone reported positive results. | <input type="checkbox"/> There were no positive results.
<input type="checkbox"/> A few people indicates some positive results.
<input type="checkbox"/> 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	Some-what	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 _____

Basic Telephone Techniques

NOTES AND EXERCISES

NOTES

The biggest reason to be serious about refreshing your telephone basics is the (customer). Your customer has other (opportunities). In the long run, it is the (customer) who pays your salary. Everyone, even the greatest professional athlete, can benefit from a review of the (basics).

You are in control of:

Your (attitude). Your attitudes can make a (huge) difference in customer relations. The law of (reciprocity) says that people will generally react to you in the way you first (act) toward them. You should, before every call, decide to (project) a (positive) attitude.

You are also in control of:

Your (response). Regardless of what the other person does or says you should remain (attentive), (respectful), and (courteous). One of the best things you can do for the other person is strive to (understand) him or her.

You are also in control of:

Your (manners). Remember to use simple good (manners).

You are also in control of:

Your (follow-through). This is a matter of doing what you (said) you would.

Some good rules to follow include:

Never open the (gate).

Never take (hostages).

Never (blame) anyone.

Never close the (door).

With respect to equipment, you should be (master) of your equipment.

EXERCISE ONE: ROLE-PLAY - “ATTITUDE”

Listen as the facilitator describes a role-play exercise. During the role-plays, when you are listening and not actively involved, listen from the point of view of the customer, and answer each of the following questions for each of the role-plays.

1. If you were the customer, how would you feel about the attitude of the Customer Service Representative?

2. Exactly what did the Customer Service Representative do to stimulate certain feelings in you?

3. What could the Customer Service Representative have done differently to create a more positive reaction from you?

SAMPLE

EXERCISE TWO: ROLE-PLAYING - “RESPONSE”

Answer each of these questions for each role-play.

1. What was the attitude expressed by the customer?

2. What exactly did the customer do to express that attitude?

3. How did the Customer Service Representative respond to that attitude?

4. What was one good thing the Customer Service Representative did?

SAMPLE

EXERCISE THREE: GENERATING IDEAS

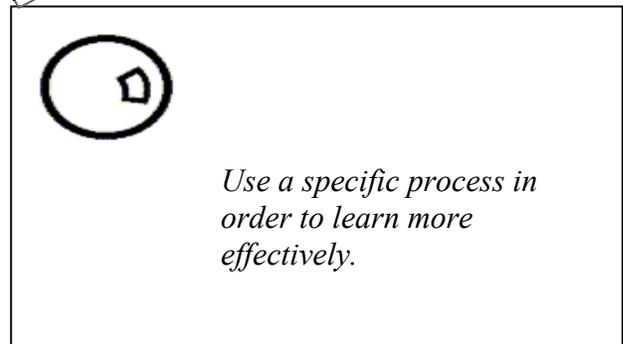
Use the bubble pads to write down at least three good ideas you gained from today's session. Remember the four criteria for a "good idea." We've illustrated a couple of samples for you.



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.*

SAMPLE

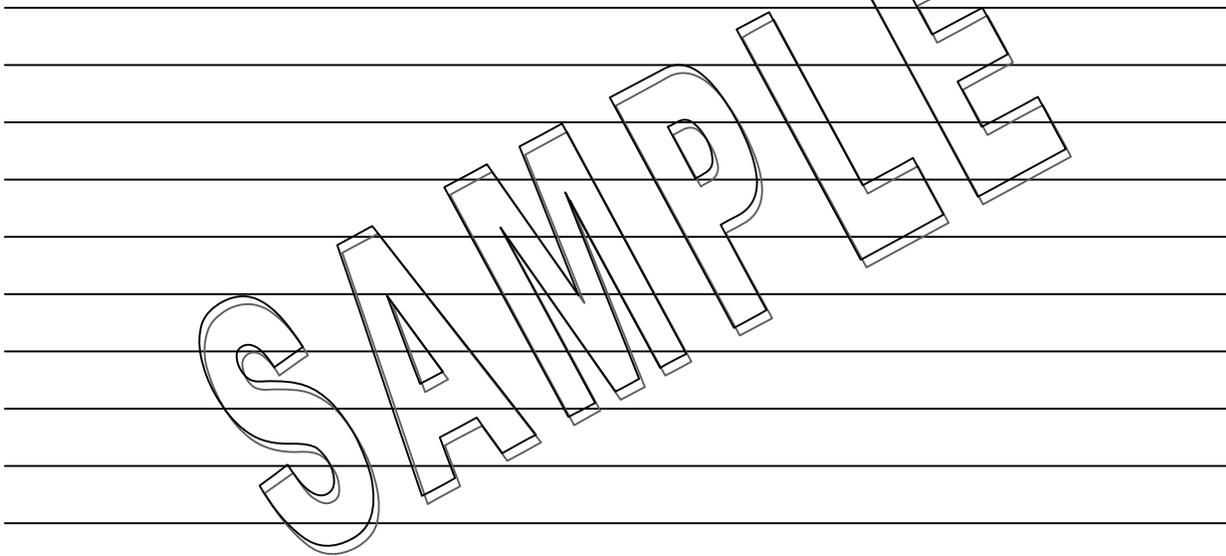


EXERCISE FOUR: DISTILLING THE BEST

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 will be easiest to implement?
4. Which of these ideas am I most passionate about?

Rewrite that idea here.



A set of horizontal lines for writing, with the word "SAMPLE" written diagonally across them in a large, outlined font.

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.

R_x (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