

**Up-A-Notch™ Sales Training System
for Outside Salespeople**

By Dave Kahle

“Prioritizing Your Customers to
Dramatically Increase Your Sales”

Facilitator’s Guide

**“Prioritizing Your Customers
to Dramatically Increase
Your Sales”**

Notes & Exercises

Congratulations, you are going to facilitate this training session.

Your job includes these things:

- facilitating the group conversations
- supporting and encouraging each member
- managing the details of the program
- holding people accountable for doing their assignments.

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Your license allows you to show the video and play the audio tapes an unlimited number of times, provided you purchase additional guides from The DaCo Corporation, 1-800-331-1287, www.davekahle.com, after you run out of the first set of participant guides.

It's important that each member of the group personally considers 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.
- _____ Have an easel or white board available.
- _____ Prepare one set of materials for each of the participants.

- ✓ Have one Participant Guide for each participant. If you need more, contact The DaCo Corporation at 800-331-1287 to order additional materials.
- ✓ 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.
- ✓ Obtain the copies of the “Prescriptions” that were written at the end of the last meeting.
- ✓ 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:

_____ Begin with a discussion of the progress the participants made on their previous prescriptions. Get last session’s prescriptions then say this:

“At each training session, we will all be making commitments for things we are going to do differently. In some cases, we may reconnect to something we already know we should be doing. In other cases it maybe something we haven’t done before, regardless, making these commitments or writing “prescriptions”, is a part of every session.

A part of every session is following up on the prescriptions we wrote in the previous training session. That is what we are going to do now. I am going to read each prescription and ask you how you are doing on that.

I will go first.”

Now, read your prescriptions and explain in detail how well you have done at accomplishing it. If you noticed some positive results, make sure that you describe them and relate these results to the actions you took on your prescription. Remember to give a well thought out, honest, detailed report. The other participants will copy your modeling of how to report.

Then proceed to ask each person to report. Say, “(person’s name), you said you were going to (read the prescription). Tell us what you did.”

When appropriate, also ask, “What result of your actions did you see?”

Be sure to thank everyone who reported, and to positively encourage those who followed through on their prescriptions.

_____ 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 “Prioritizing Your Customers.” Take a couple of minutes to look through the materials. Note that the pages marked “Notes” at the top are to be 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: Developing Your Criteria for Partnerability

- ✓ Read the directions at the top of Exercise One from the participant’s guide out loud to the group. Then give everyone about 5 – 8 minutes to begin creating their own list.
- ✓ When everyone has finished, ask each person to share his/her list. Write them on a white board or easel.
- ✓ Go around the room and get input from everyone. See if you can agree on a master list.
- ✓ If you have several market segments, you may want to repeat this exercise for each market segment you service.
- ✓ Finally, have someone transcribe the list from your white board or easel, and distribute copies of the list for everyone’s benefit.

Exercise Two: Developing Your Criteria for Quantified Potential.

- ✓ Read the directions at the top of Exercise Two from the participant's guide out loud to the group. Then give everyone about five to eight minutes to begin creating their own list.
- ✓ When everyone has finished, ask each person to share his/her list. Write them on a white board or easel.
- ✓ Go around the room and get input from everyone. See if you can agree on a master list.
- ✓ If you have several market segments, you may want to repeat this exercise for each market segment you service.
- ✓ Finally, have someone transcribe the list from your white board or easel, and distribute copies of the list for everyone's benefit.

Exercise Three: Rating Your Accounts

- ✓ Read the directions to Exercise Three out loud. Then give everyone about ten to fifteen minutes to complete it.
- ✓ When everyone has finished, ask a couple people to share one or two of their ratings, and explain why they rated the account that way.

Exercise Four: Planning for Investing Your Time Appropriately

- ✓ Read the directions to Exercise Four out loud. Then give everyone about ten to fifteen minutes to complete it.
- ✓ When everyone has finished, ask a couple of people to share their weekly lists, and explain why they chose what they did.

Exercise Five: 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 Six: Distilling the Best

- ✓ Give everyone a few moments to complete it.
- ✓ Ask each person to share his or her ideas.

Exercise Seven: 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.

Congratulations! You have just successfully facilitated this training session.

Evaluation

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

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

Notes

The principles and processes described in this program can make a *(transformational)* change in your performance.

One of the biggest challenges for salespeople today is *(time)* management. When you begin to deal with improving your time management, you need to address two issues. They are, becoming more *(efficient)* and becoming more *(effective)*.

The six major competencies, or the Six –hats for the successful 21st Century salesperson are:

1. Astute *(planner)*
2. *(Trusted)* friend
3. Effective *(consultant)*
4. Skillful *(influencer)*
5. Adept *(human) (resources)* manager
6. Master *(learner)*

The premise for this process is that you have too much to do, and *(not) (enough)* time in which to do it. Under those circumstances, your only option is to *(prioritize)*. The most important aspect of your job is that which encompasses your *(customers)* and *(prospects)*. So, an important time management strategy is to *(prioritize)* your customers and *(prospects)*.

One of the secrets to going from mindless habit to mindful action is to make *(cold)* blooded *(business)* decisions.

The basic principle is that “Some (prospects) and (customers) have more (potential) than others.” This leads to a basic strategy – “You should spend the (most) time with the (highest) potential.”

Potential does not refer to how much money the account has spent with you in the past. Rather, it refers to the (ratio) of the likelihood of (dollars) returned for time invested.

In order to implement that strategy, you should follow a five-step process. This process is:

1. Develop some (criteria).
2. Analyze all your prospects and (customers) in light of those criteria.
3. Create (A, B, C) categories.
4. Invest your time (appropriately).
5. Repeat the (process) regularly.

The ABC categories should be described as follows:

- A. Your (highest) potential. Should contain 5% to (20%) of your total.
- B. Your next highest (potential). Should contain 20 - 50% of your (total).
- C. Your lowest (potential). Should contain 20 - 50% of all your accounts.

The two criteria you should use to rank your customers and prospects in these categories are:

1. (Partnerability). This is defined as the (subjective) understanding your gain as to the (likelihood) of the prospect or customer eventually becoming a (partner).

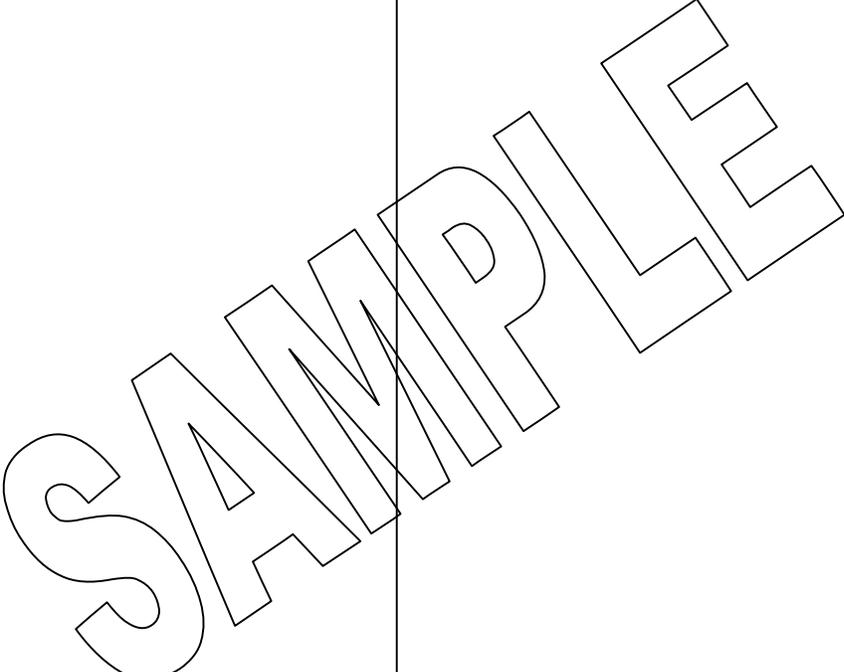
2. Quantified *(potential)*. This is defined as the *(objective)* analysis of how much business they *(could)* do with you.

By ranking each account separately on these two criteria, and then combining the rankings, you gain a simple, easy-to-use tool to allow you to implement this most important sales process.

Exercise One: Developing Criteria for Partnerability

Identify one type of business (market segment) on which you call. Identify that segment here:

Now, think of specific characteristics of that account that would indicate that either they are likely to develop into a partner, or are not likely to develop into a partner. List those items in the plus or minus column, below.

+	-
	

Exercise Two: Developing Criteria for “Quantified Potential”

Directions: Think about each type of business on which you call. List each separately. Then fill in the numbers that would indicate the three levels of quantified potential for each of those types of business. We’ve done an example for you.

Type: Independent convenience stores.

- A. = more than \$50,000 in annual potential.
- B. = Between \$10,000 and \$49,999 in annual potential.
- C. = less than \$9,999 in annual potential.

Type: _____

- A. = more than _____ in annual potential.
- B. = between _____ and _____ in annual potential.
- C. = less than _____ in annual potential

Type: _____

- A. = more than _____ in annual potential.
- B. = between _____ and _____ in annual potential.
- C. = less than _____ in annual potential

Type: _____

- A. = more than _____ in annual potential
- B. = between _____ and _____ in annual potential.
- C. = less than _____ in annual potential

Type: _____

- A. = more than _____ in annual potential.
- B. = between _____ and _____ in annual potential.
- C. = less than _____ in annual potential

Type: _____

- A. = more than _____ in annual potential.
- B. = between _____ and _____ in annual potential.
- C. = less than _____ in annual potential

Type: _____

- A. = more than _____ in annual potential.
- B. = between _____ and _____ in annual potential.
- C. = less than _____ in annual potential

Exercise Four: Planning for Investing Your Time Appropriately

Once you have ranked your customers and prospects into A, B, or C categories, you now must use that information to make cold-blooded business decisions about where to invest your time. Use the space below to identify those accounts that you want to emphasize next week and each of the following three weeks after that. Simply list the A and B accounts that will get the majority of your time in each of the four weeks.

Next week: (dates) _____

Following week: (dates) _____

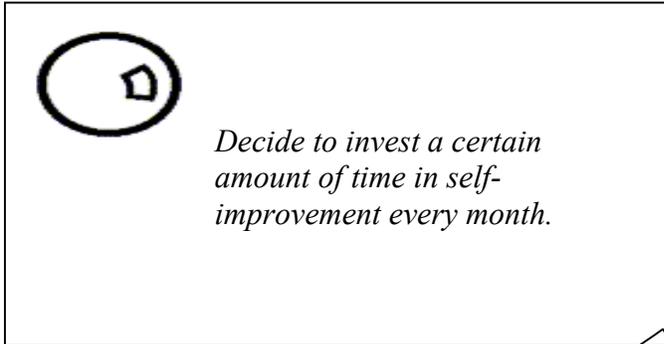
Following week: (dates) _____

Following week: (dates) _____

SAMPLE

Exercise Five: Generating Ideas

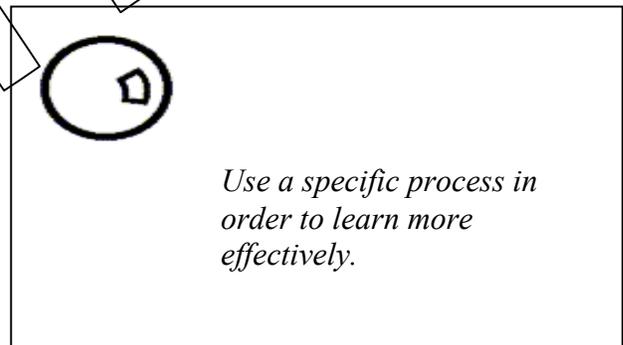
Use the bubble pads to write down at least three good ideas you gained from today's session. Remember the four criteria for a "good idea." We've illustrated a couple of samples for you.



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

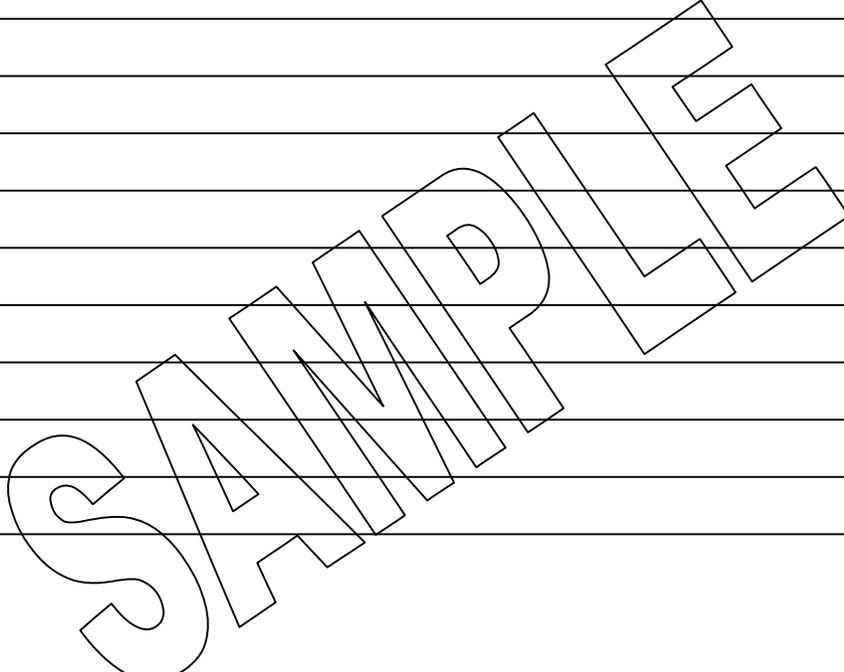


Exercise Six: Distilling the Best

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 am I most passionate about?

Rewrite that idea here.



Exercise Seven: 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.



(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