Up-a-Notch™ Sales Training System for Inside Salespeople

By Dave Kahle

Asking Questions to Understand Your Customer

FACILITATOR'S GUIDE

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.

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.

____ 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.

<u>During the training session:</u>

____ 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 participant manuals. 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 "Asking Questions to Understand Your Customer." 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: Preparing Good Questions.*

- ✓ Give everyone a few moments to read the directions.
- ✓ Then put the group into small groups of two or three people each. Group people together who have the same job. In other words, if you have two customer service representatives and three inside sales people, group the customer service reps together ad the inside sales people together.
- ✓ Now allow each group a couple of moments to describe a situation they want to work on, and then identify some objectives they'd like to achieve in that situation.
- ✓ When everyone is finished, ask each group to share their situations with the larger group. Generate some discussion so that people will gain ideas from one another.
- ✓ Now allow each group five to ten minutes to brainstorm some possible questions to use in the situation they developed. Remind them to write the questions word for word.
- ✓ When everyone is ready, have each small group share their questions. Encourage discussion and input about each question.
- ✓ When all the questions have been examined, give each group a few moments to rewrite and prioritize their questions.

Note: You can repeat this exercise as many times as you'd like, asking the participants to focus on and prepare for a different situation each time.

___ *Exercise Two: 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 Three: Distilling the Best*

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

___ *Exercise Four: 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.

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.

____ No one acted on their prescriptions.
____ A couple of people acted on their prescriptions.
____ Most attempted to complete their prescriptions.
____ Everyone acted on their prescriptions.
____ Everyone reported positive results.

____ There were no positive results.
____ A few people indicates some positive results.
____ 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 _____

Asking Questions to Understand Your Customer

NOTES

We've been trained that a question is designed to elicit an *(answer)*. But a question can be *(much) (more)*. The largest, most important part of today's sales and service process is accomplished when you *(understand)* the *(customer)*.

In the Information Age, 75 percent of your *(success)* in sales and service lies in *(understanding)* the *(customer)*.

Principle One

Your customers <u>want</u> to be *(understood)*.

There is something deep down in human beings that *(hungers)* to be *(understood)*. We all want other people to understand our *(feelings)*, our *(thoughts)*, our *(attitudes)* and our *(motivations)*.

Principle Two

People face a growing and bewildering number of *(choices)*.

Many of your customers have too much to do and not enough time in which to do it. So they instinctively look for *(someone)* who can take some of the *(burden)* off them—someone who *(understands)* their *(situation)* and helps them solve their *(problems)* and achieve their *(objectives)*.

Principle Three

People are hungry for relationships with competent people they can *(trust)*.

For most buyers today, *(risk)* is the ultimate deciding factor. It's not the cost in financial terms of a decision; it's the *(risk)*. When your company asks customers and prospects

to say yes to something, those customers and prospects are accepting some risk. Each decision carries a different (degree) of risk.

One way to mitigate the (risk) is to create a strong (relationship) with the customer. When your customers see you as a (competent) (person) they can trust, the buying decision becomes less of a (risk).

The (question) is the (key) to unlocking all the good things that can happen in an interaction with your customer. Asking good questions is a way to unlock the power of the three principles we just discussed.

First, a well-phrased, appropriately timed question (directs) *your customer's* (thinking). You can use questions to help them think through things and discover what they really want or need.

Secondly, a question is a powerful tool to (build) (relationships) with your customers. Show (interest) (in) your customer, and he/she will reciprocate by showing (interest) (in) you.

The way you show interest in someone is to ask him or her (questions) about themselves.

A series of good questions (conveys) *the perception of your* (competence).

A good question is your best means of (collecting) (the) (information)– understanding the customer and the customers' situation -- that will help you meet the needs of your customer.

What all this means is that if you're going to be successful in your job, you need to master the ability to (ask) (good) (questions).

The Processes

If you're going to become skilled at the use of questions, you need to master two *(processes)*.

1. Preparing *(questions)* *(word)*-*(for)*-*(word)*.

2. Using questions effectively.

The *(laguage)* *(in)* your question must be perfect, because the words in your question direct your prospect's *(thinking)*. A little change in words can make a huge *(difference)* in you're prospect's *(response)*. So, the first rule of good questions is to prepare your basic *(questions)* word-for-word.

Step One: Sketch the situation. Begin by thinking about the *(situation)* you'll be encountering. Take a few moments and *(construct)* it in your mind. Identify those situations that you often encounter.

Step Two: -- Describe your goals for that *(situation)*. Then think about what you want to *(accomplish)* in that situation.

Step Three: Brainstorm a number of *(possibilities)*.

Step Four: *(Edit)* and refine.

Step Five: Develop an *(effective)* *(sequence)*.

Step Six: *(Practice)*.

EXERCISE ONE:
PREPARING GOOD QUESTIONS

1. Working together with a partner, select a situation that the two of you will likely face in the next week. A situation is a typical interaction with a customer. For example, one common situation may be a customer calling inquiring about the price or availability of a product.

   Describe the situation you chose to work on in the space below:

2. Now, identify some objectives for that situation. What would you like to achieve in that situation?

3. Now, brainstorm some questions you could ask to achieve your objectives in that situation. Remember to write the questions out word-for-word.

4. Share your questions with others in the training session, and get their feedback on them.

5. Re-write and sequence them in the space below.

6. Now practice them.

7. Use them in when you encounter that situation.

EXERCISE TWO:
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.*

Decide to invest a certain amount of time in self-improvement every month.

Use a specific process in order to learn more effectively.

EXERCISE THREE:
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.

EXERCISE FOUR:
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.