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

By Dave Kahle

"Be Your Customer's Consultant"

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 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.

<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 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 to of Exercise One 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 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.

____ 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	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 _____

“Be Your Customer’s Consultant”

Notes & Exercises

Notes

What does it mean to be a consultant? A consultant is someone you pay to *(understand)* you and your *(situation)*, and then to help you overcome *(problems)* and achieve *(objectives)*.

One major thing you expect of consultants is that they take the time to *(understand)* you and your *(situation)*.

Success at selling in the Information Age requires you to become more of a *(consultant)* to your customers. Many of your customers have too *(much)* to *(do)* and not enough time in which to do it. When overwhelmed, one natural reaction is to fall back on a *(competent)* person they can *(trust)* – someone who has earned the position of being an effective *(consultant)* to them.

The First Principle: ***Your customers want to be (understood).***

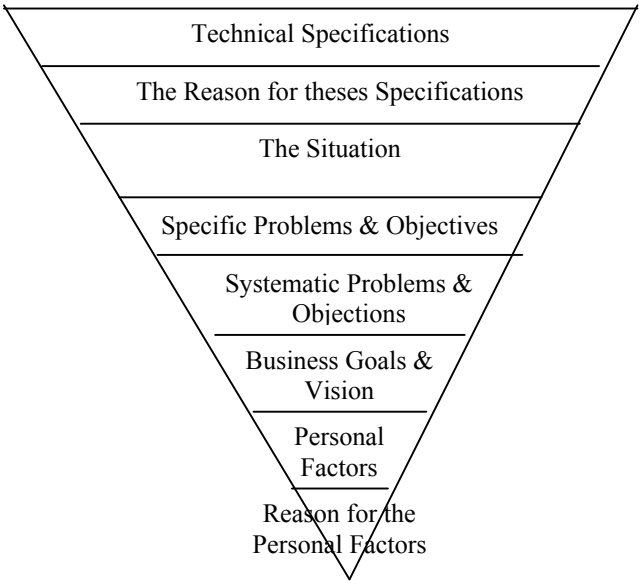
From our perspective as buyers, we're favorably impressed with salespeople who take the time to *(understand)* us. The same thing is true of your customers.

Understanding your customer is like peeling an onion.

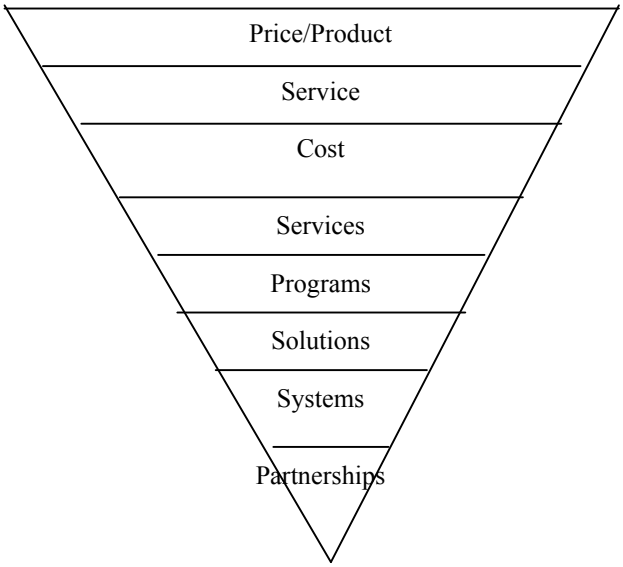
Just like there are layers and layers to an onion, so there are layers and layers to your *(customer)*. Just like the superficial layers of an onion are *(thin)* and *(mild)*, so too, the superficial levels of your customers have little *(strength)*. But as you peel the onion deeper and deeper, the strength increases. So, too, with your *(customers)*

Fill in the onions.

What You Know About The Customer



What Do You Sell?



Think of the word PIE. The most superficial are *problems or* *(objections)*. The second layer down consists of the *implications.* In other words, you take the time to understand the *(consequences)* of successfully solving the *(problem)* or meeting the *(objective)*, as well as the *(consequences)* of *(not)* doing so.

Now, let's peel the onion one more level deeper, and discover the *(emotional)* level. How do the implications make the individuals within that company *(feel)*?

Look at the first level. If all you know about the customer is the *(technical)* specifications, all you can sell is *(price)*. If, however, you have taken the time to know your customer at ever *(deeper)* *(levels)*, you'll be able to sell at deeper levels. And that's where your ultimate and long-term success lies.

If you are going to distance yourself from your *(competitors)*, if you are going make yourself *(effective)* and *(productive)*, if you are going to secure deep and long lasting *(relationships)* with your *(customers)*, you must sell at *(deeper)* *(levels)*. To do that you must be a *(consultant)* to your customers.

Exercise One: Peeling the Onion

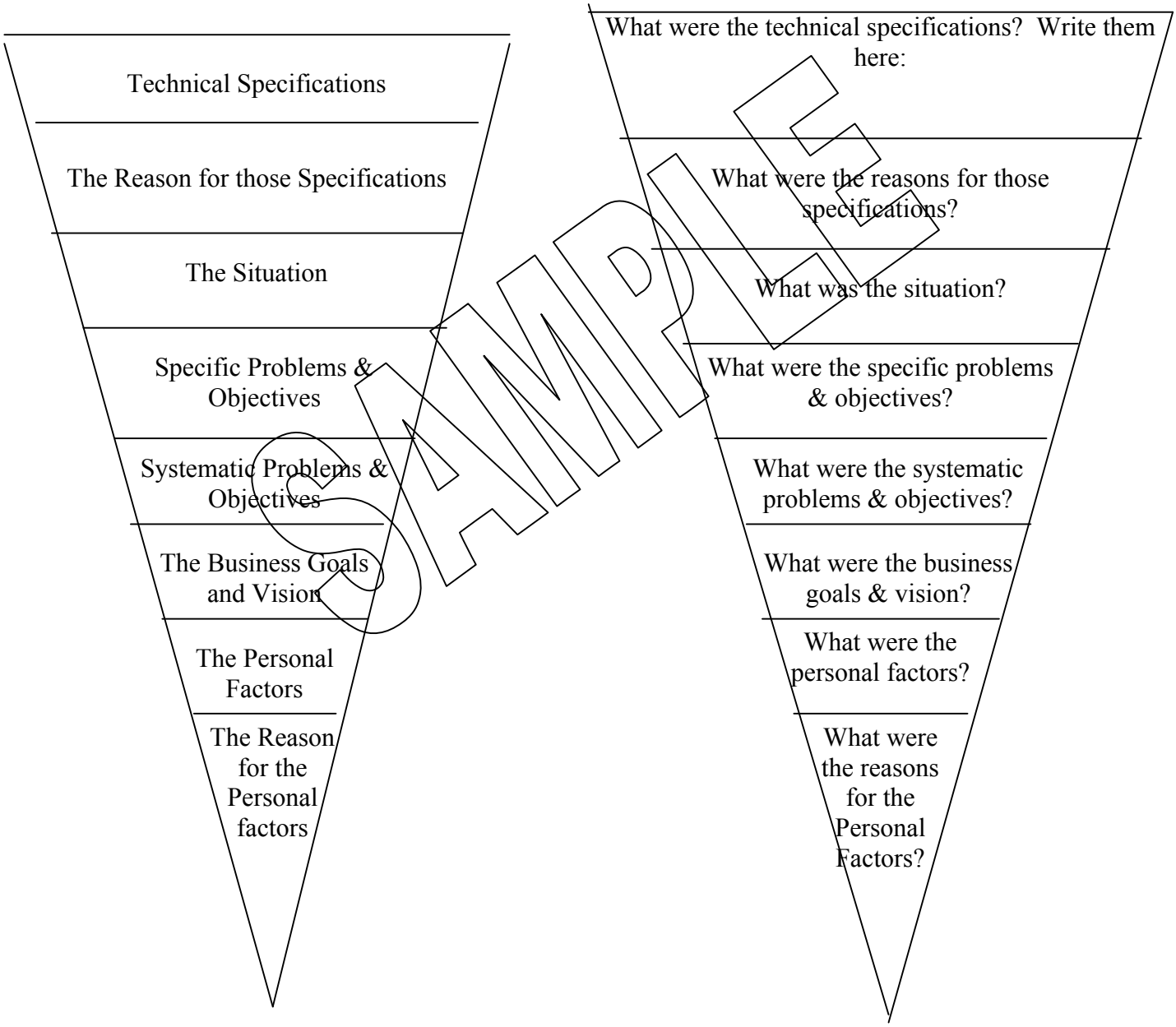
A. Identify a current customer. Write the name of the account here:

_____

B. Identify some product that customer recently purchased form you:

_____

C. Test your knowledge of that customer by describing as best you can, each layer of the onion relative to that customer and that purchase.



Exercise Two: Preparing to Peel the Onion Using the Simplified PIE

a. Name a customer you expect to call on next week.

Account:_____ Person:_____

b. Prepare questions that will help you uncover each of the three levels: P I E.

Problems or Objectives

What will you ask to uncover problems the customer may have? What will you ask to uncover objectives the customer wants to achieve?

_____
_____
_____
_____
_____

Implications

How will you get the customer to discuss the implications of solving the problem? Of not solving the problem? Of achieving the objectives? Of not reaching the objective?

_____
_____
_____
_____
_____

Emotions

How will you get the customer to discover how those implications make him/her feel?

_____
_____
_____
_____
_____

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.*

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

Use a specific process in order to learn more effectively.

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 am I most passionate about?

Rewrite that idea here.

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.

(Precisely Prescribe)

I will set aside two hours every week for personal improvement and keep a record of what I do in that time.