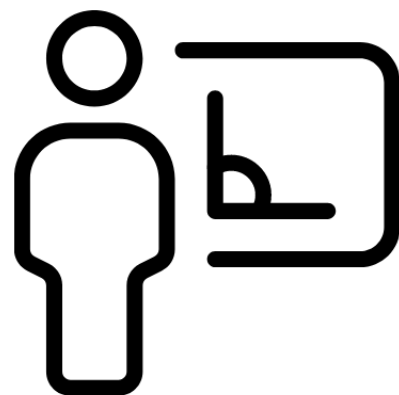


Instructors Guide



On the following pages is a sample module from our Instructor Guide. It provides the instructor with a copy of the material and a Lesson Plans box.

The key benefit for the trainer is the Lesson Plan box. It provides a standardized set of tools to assist the instructor for each lesson. The Lesson Plan box gives an estimated time to complete the lesson, any materials that are needed for the lesson, recommended activities, and additional points to assist in delivering the lessons such as Stories to Share and Delivery Tips.



Quality in service or products is not what you put into it. It is what the client or customer gets out of it.

Peter Drucker

Module Two: The Basics (I)



Every telephone sales associate wants to increase productivity. Constant changes and innovations in the marketplace are sometimes hard to keep up with. The reason people elect to buy is often not a result of logic and planning but rather emotion or felt need. Effective sales associates try to identify the Dominant Buying Motive (DBM) of the buyer on the other end of the phone. Discovering this takes careful listening skills and the suspension of the idea that people always do things for logical reasons.

Defining Buying Motives



Dominant Buying Motive (DBM) is the main reason the customer or buyer will select your product over the competition. It is driven by the felt need that your product provides to the customer. This motive is not always something the buyer is fully aware of. With some questioning and dialogue, skilled sales associates can unearth the DBM and help the buyer do what will ultimately make them happy; buy your product.

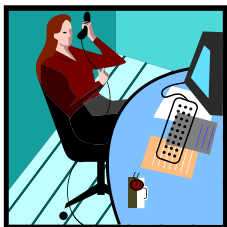
Four Motives for Buying:

- 1.) **Logical Reason A) Save Time:** The buyer may believe that buying your product will save them time in the long run, in contrast with the competition's product offering. This may be a faster computer, a car, or a service from your company.
- 2.) **Logical Reason B) Save Money:** The buyer may believe that buying your product will save them money either in the short or long term. The financial savings they seek does not come at the cost of any features or practical application the products provide.
- 3.) **Emotional Reason A):** The buyer has a strong brand loyalty and trust in the product. This may cause them to be willing to pay more for the security of the known brand loyalty.
- 4.) **Emotional Reason B):** The buyer trusts the sales person and their judgment in recommending a product. The sales associate has demonstrated expertise and

credibility that has won the confidence of the customer so that they are willing to take the suggestion of the sales associate and buy the product.

Estimated Time	10 minutes
Topic Objective	Introduce motivations of the buyer
Topic Summary	What Is Dominant Buying Motivation? This exercise allows participants to understand logical vs. emotional reasons why a customer buys particular products.
Materials Required	Paper Pens or pencils
Planning Checklist	None
Recommended Activity	Review the module and the logical and emotional reasons why customers make certain purchases. Create your own list of three other logical and emotional reasons why these purchases are made. Allow participants to work independently. Review as a group.
Stories to Share	Ask the participants to share some of the motivations they have in buying products. You may want to begin by sharing some personal anecdotes.
Delivery Tips	Skip the large group conversation if you need more time.
Review Questions	What are the two types of reasons that a customer makes a purchase?

Establishing a Call Strategy



The advice “stop talking” may seem counter intuitive to making a sale, but many sales people talk excessively and fail to listen to the customer. The problem with constantly talking is that you are unable to truly understand the underlying needs of the customer. We feel a need to control the conversation or we will lose the sale. For example, an army recruiter can spend all his time trying to convince the recruit to sign up for military service but fail to listen to the young man explain how his grandfather was killed in a military conflict. This gives him both motivation and hesitation in following in his grandfather's footsteps. The recruiter needs to empathize with the young man's loss and filter the pain into a motivation for heroism.

Estimated Time	10 minutes
Topic Objective	Relate how talking may not be the most effective strategy; compared to listening.
Topic Summary	Establishing a Call Strategy Talking continually can cause the seller to miss important clues the buyer sends.
Required	Worksheet 1: Listening
Planning Checklist	None
Recommended Activity	Meet with a partner and take turns role playing the scenario on the handout. Discuss your reactions with the rest of the group.
Stories to Share	Share that scientists believe that listening can be improved. There is a link to an article below. http://www.http://www.businesslistening.com/customer-listening.php
Delivery Tips	If you feel that you are short on time skip the group discussion.
Review Questions	How does talking hinder listening?

Prospecting



Prospecting is a method of evaluating the potential of a buyer or customer. Prospecting takes into consideration the likelihood that the buyer has the means and the motivation to buy your product. Ranking potential buyers in a systematic way allows phone sales associates to close more deals and spend their time with customers who are more prepared to make the decision to buy the product. Those who are further down the motivational scale and do not appear to have the means to make a deal, can be given less time and attention or kept on file for future contact when they are able to make a deal.

Estimated Time	5 minutes
Topic Objective	Outline Prospecting
Topic Summary	What is Prospecting?

	Discuss the ways that prospecting helps with creating sales?
Materials Required	Flip chart/ Marker
Planning Checklist	None
Recommended Activity	Have participants consider situations when prospecting helped them close a deal. Write their responses on the flip chart.
Stories to Share	Explain that prospecting is widely used in many industries to increase sales. The article at the link below describes how Dow Jones uses prospecting. https://www.dowjones.com/professional/blog/conducting-better-prospecting
Delivery Tips	None.
Review Questions	What is prospecting?

Qualifying



When qualifying a prospect you are evaluating that they are in a position to decide to buy your product. If you are talking to someone in an organization, it is important to speak only to the person who has the authority to finalize a purchase. If the person is not authorized to make a deal with you then find out when the person who is able to close the deal is available, and call back. Once you have contacted the person with the authority to buy your product, then inquire if they have the means to close the deal. This may involve finding out information about available funds on credit cards, lines of credit, and monthly budget. It is important to know how much an individual makes per month and their current economic commitments.

Estimated Time	10 minutes
Topic Objective	Outline qualifying
Topic Summary	What is Qualifying? Discuss the ways that Qualifying helps with creating sales?
Materials Required	Flip chart/ Marker
Planning Checklist	None

Recommended Activity	Have the students consider situations when qualifying helped them close a deal. Write their responses on the flip chart.
Stories to Share	None
Delivery Tips	None.
Review Questions	What is qualifying?

Practical Illustration



Dan’s company needed to make increased profits in their next quarter. They decided to change their call center procedure. Previously, the call center representatives would call their clients and discuss the products they should have.

Dan told his employees that the new strategy requires the representatives to check the customer’s profile before calling and determine the products they currently have, as well as their financial situation.

The reps must then listen to what the customer says they need as well as ask probing questions to uncover unspoken truths. This allows them to identify why the customer needs or wants to make an additional purchase.

Dan noticed a 10% increase in profits since the implementation of the new system.

Module Two: Review Questions

1.) What does DBM stand for?

- a) Dominant Buying Motive
- b) Definitely Buy More
- c) Drastic Buying Motive
- d) Dominant Buyer Metrics

It is important to uncover the true reason why a customer wants to buy a particular product. Having this understanding could be the difference between the customer buying from you or the competition.

2.) The customer decides to buy the lawn mower from you rather than the competition because your product is less expensive. What type of reason does the customer give for buying from you?

- a) Emotional
- b) Logical
- c) Pride of ownership
- d) Fear of loss

When a customer decides to make a purchase based on logic, he is making a purchase based on a concrete fact rather than the way they feel about it.

3.) What is the gist of the strategy in “Establishing a Call Strategy”?

- a) The sales person should continually talk over the customer
- b) The sales person should let the customer do *all* of the talking
- c) The sales person should talk enough to explain what they are selling, but not so much that they miss opportunities to learn about the customer by simply listening
- d) The sales person and customer should come to a mutual agreement about who should do the most talking

The purpose of the sales call is to close the deal. A wise salesperson would want to do this as efficiently as possible. With this in mind, it is important for the salesperson to have a strategy before speaking with the customer so the conversation runs smoothly. Part of the strategy should be to allow the customer to do a lot of the talking so the salesperson can better cater their pitch to the customer.

4.) In the example about the army recruiter, the recruiter missed an opportunity to do what?

- a) Empathize with the young man
- b) Encourage the young man to join the Army
- c) Speak to the young man
- d) Control the conversation

The recruiter was so eager to encourage the young man to join the Army that he missed the opportunity to acknowledge the young man's apprehension and possibly convert that to an opportunity to convince the young man to join.

5.) What does prospecting mean?

- a) To make a sale to a customer
- b) To lose a sale
- c) To evaluate whether or not the individual has the motivation and or means to make a purchase
- d) To evaluate whether or not the individual has the authority to make the purchase

This module focuses on qualifying and prospecting. Choice C defines prospecting. Qualifying is evaluating whether or not the individual has the authority to agree to a deal.

6.) What is the best way to respond to a prospective client when you discover they do not have the motivation to close a deal?

- a) Tell them they are wasting your time
- b) Verbally pressure them into closing the deal
- c) Discreetly move on to prospects that are more likely to close the deal
- d) Send a letter pressuring them to close the deal

It is never acceptable to pressure a prospect into doing what you want them to do. Informing the individual that they are wasting your time is unprofessional and impolite.

7.) What does qualifying mean?

- a) To lose a sale
- b) To evaluate whether or not the individual has the motivation and / or means to make a purchase
- c) To make a sale to a customer
- d) To evaluate whether or not the individual has the authority to make the purchase

This module focuses on qualifying and prospecting. Choice D defines qualifying. Prospecting is evaluating whether or not the individual has the motivation and/or means to make a purchase.

8.) Who should you speak to if you are trying to make a sale to an organization?

- a) The first person who answers your call
- b) The CEO
- c) The company's customer service department
- d) The person that can make the decision of whether or not to buy

Usually when you call a company, the person who answers your call is generally not the one who can make a decision about purchasing from your company. Although the CEO is a crucial part of a company and ultimately the one who makes buying decisions, it is best to follow the proper protocol and speak to the authorized individual as quickly as possible.

9.) According to the information in this module, constant changes and innovations in the marketplace are sometimes hard to _____.

- a) Predict
- b) Talk about
- c) Keep up with
- d) None of the above

Constant changes and innovations in the marketplace are sometimes hard to keep up with.

10.) _____ is the main reason the customer or buyer will select your product over the competition.

- a) SMART
- b) DBM
- c) CEO
- d) All of the above

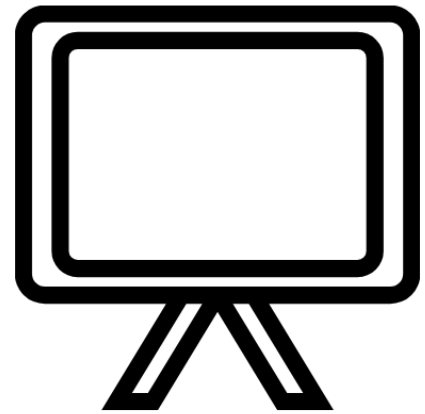
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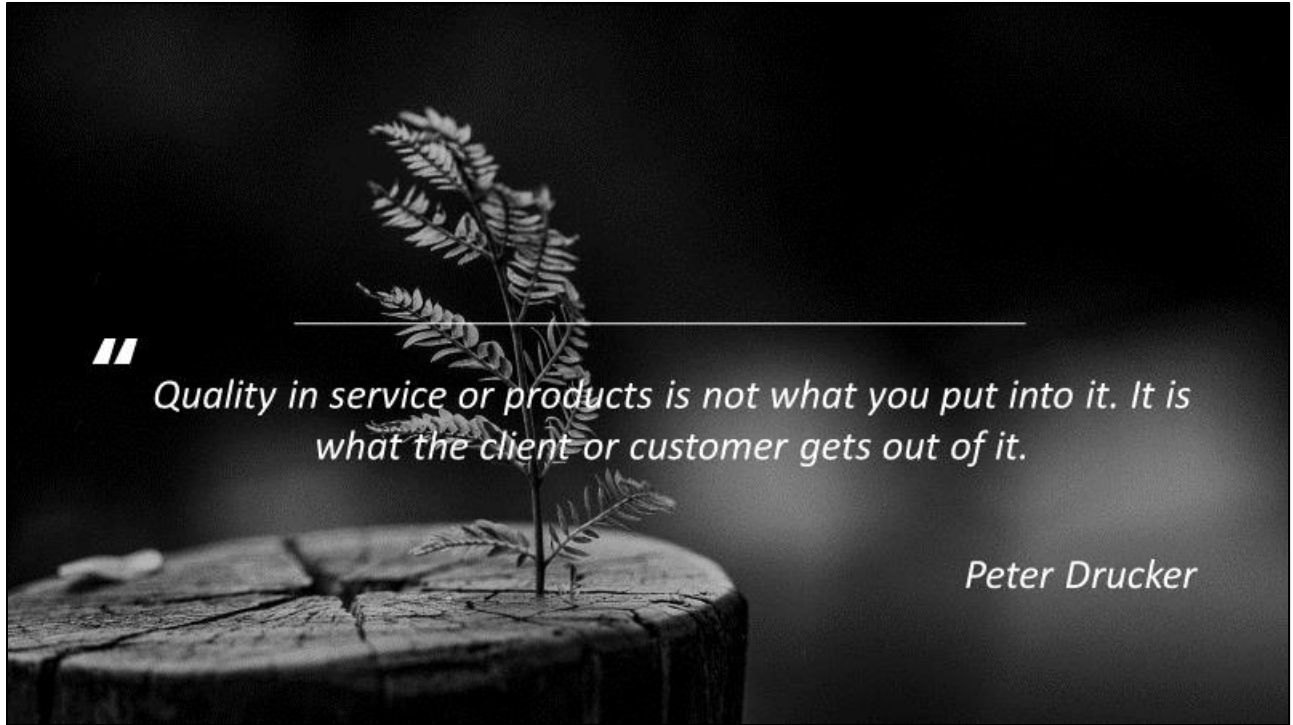
PowerPoint Slides



Below you will find the PowerPoint sample. The slides are based on and created from the Instructor Guide.

PowerPoint slides are a great tool to use during the facilitation of the material; they help to focus on the important points of information presented during the training.





MODULE TWO

The Basics (I)

Every telephone sales associate wants to increase productivity.

Constant changes and innovations in the marketplace are sometimes hard to keep up with.



Defining Buying Motives

- Save Time
- Save Money
- Brand Loyalty
- Trust

Establishing a Call Strategy

The problem with constantly talking is that you are unable to truly understand the underlying needs of the customer.





Prospecting

Prospecting takes into consideration the likelihood that the buyer has the means and the motivation to buy your product.

Qualifying

When qualifying a prospect you are evaluating that they are in a position to decide to buy your product.



Practical Illustration



- Defining Buying Motives
- Establishing a Call Strategy
- Prospecting
- Qualifying

Module Two: Review Questions

1. What does DBM stand for?

A. Dominant Buying Motive

B. Definitely Buy More

C. Drastic Buying Motive

D. Dominant Buyer Metrics

Quick Reference Sheets



Below is an example of our Quick Reference Sheets. They are used to provide the participants with a quick way to reference the material after the course has been completed. They can be customized by the trainer to provide the material deemed the most important. They are a way the participants can look back and reference the material at a later date. They are also very useful as a take-away from the workshop when branded. When a participant leaves with a Quick Reference Sheet it provides a great way to promote future business.



Call Center Training

Quick Reference Sheet



Defining Buying Motives

Dominant Buying Motive (DBM) is the main reason the customer or buyer will select your product over the competition. It is driven by the felt need that your product provides to the customer. This motive is not always something the buyer is fully aware of. With some questioning and dialogue skilled sales associates can unearth the DBM and help the buyer do what will ultimately make them happy; buy your product.

Four Motives for Buying:

- **Logical Reason A) Save Time:** The buyer may believe that buying your product will save them time in the long run in contrast with the competition's product offering. This may be a faster computer, a car, or a service from your company.
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- **Emotional Reason B):** The buyer trusts the sales person and their judgment in recommending a product. The sales associate has demonstrated expertise and credibility that has won the confidence of the customer so that they are willing to take the suggestion of the sales associate and buy the product.

Effective Listening

When a complaint arises, businesses often fail to leave customers satisfied due to poor listening skills. The root problem must be identified. There might be several sources of discontent being voiced at once. The customer service representative or other person handling the complaint should list the issues being presented. After confirming they have heard all the concerns effectively, they can propose an adequate solution to one, two or possibly all the areas mentioned. With a sincere apology for the areas where no action can remedy the situation, most customers are content, and their confidence in the relationship is restored.

Examples of Effective Listening

Taking mental or physical notes



Allowing the speaker to express themselves without interruption



Using signs of agreement in the conversation without interrupting the flow



Avoiding multi-tasking while the conversation is in progress



Restating the issues to assure you comprehend what was said

SMART Goals

SMART GOALS are objectives that meet the following characteristics.

Specific: Smart goals are specific in that they mention how much by when. I will get a job earning \$30 an hour by June, 2011.

Measurable: Smart goals are measurable. I will decrease my waist-line by 4 inches.

Achievable: Even if no one has ever achieved the goal before there is some reason to believe it is attainable. You may have a record of gradual progress toward the goal to inspire you. The goal is within reach of your past performances.

Realistic Very similar to achievable is the realistic nature of the smart goal. Having a goal to sprout wings and fly over the top of a building is not a SMART goal but a foolish fantasy. You cannot set a goal to suspend laws of nature such as gravity.

Time sensitive: There is an end date by which the goal is declared attained or not. For example, one girl committed to sell 1,000 boxes of Girl Scout cookies in a month.

Performance Breakdown

Performance Breakdown is the analysis of the efficiency of an employees' work. It may be done on the individual or group level. The performance breakdown isolates specific tasks required to successfully do the job. Areas of strength can be noted and modeled throughout the company. Areas of weakness can be strengthened by further training and instruction. In a call center, the following areas may be the focus of a performance breakdown.



Telephone etiquette: How professional does the employee sound when conversing with customers on the phone?

Handling objections: How skilled is the employee at answering questions and objections about the product or service?

Record keeping: How skilled is the employee at maintaining call logs and notes to follow through with contact in the future?

Transferring: How tactfully does the employee pass a call on to the person who can make a deal or solve a problem for the customer?

Closing: How can the employee finalize a sale and obtain the information and the financial commitment from the customer?

Overcoming Limitations

Performance Breakdown is the analysis of the efficiency of an employees' work. It may be done on the individual or group level. The performance breakdown isolates specific tasks required to successfully do the job. Areas of strength can be noted and modeled throughout the company. Areas of weakness can be strengthened by further training and instruction. In a call center, the following areas may be the focus of a performance breakdown.

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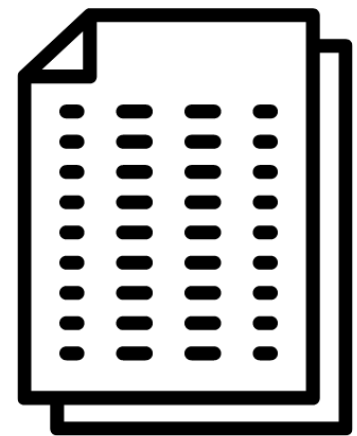
Handouts



Each course is provided with a wide range of worksheets.

Worksheets help check your participants' understanding. If a lesson calls for a worksheet, it will be listed in the Lesson Plan box under Materials Required. All worksheets are customizable and can be found in the Appendix of the Instructor Guide and the Training Manual.

As a trainer, icebreakers give your participants the opportunity to get to know each other better or simply begin the training session on a positive note. Icebreakers promote collaboration, increase engagement, and make your training more light-hearted and fun. Below is an example from the Icebreakers folder.



Sample Worksheet 1

Listening

One partner will read the following scenario. The other partner will listen to the partner, read the entire scenario, then respond by empathizing with the reader and offering solutions to the dilemma.

Scenario

I really want your company to install a swimming pool in my backyard, but I have a one-year-old and after hearing all of the horrific stories of babies drowning I just don't think I can do it. I know they have baby gates and other measures to prevent that from happening, but sometimes those things malfunction and accidents happen.

Icebreaker: Hello, My Name Is...

Option 1:

Method: Perhaps the easiest, most obvious and often overlooked icebreaker.

Ask each member of the training event to introduce themselves by saying *Hello – My Name Is...*

Then encourage the rest of the group to ask the trainee questions. To illustrate,

- Where do you live?
- What is your job?
- Where did you go to school? Etc.

This exercise also encourages questioning and listening skills within the group.

Discussion Questions

1. Did anyone feel uncomfortable doing this exercise? If so, why?
2. How can this exercise help us during today's training event?

Time: Maximum time 15 minutes

Option 2:

1. Have the participants at each table answer the following questions:
 - a. Why are they here?
 - b. What is their level of experience with phone etiquette and call centers?
 - c. What they hope to get from this class?
 - d. What is the most interesting thing they have ever done in their lives?
2. Have someone be designated a scribe and have them jot down the answers to question C above.
3. On a separate piece of paper, have them write down the most interesting thing done from only one table member.
4. Have the scribe hand the note with the answers to question C to you.
5. Have the scribe stand and introduce the table to the class.
6. Then have the scribe share the most interesting thing from their group.
7. Have the class guess who that person is, who did the most interesting thing.

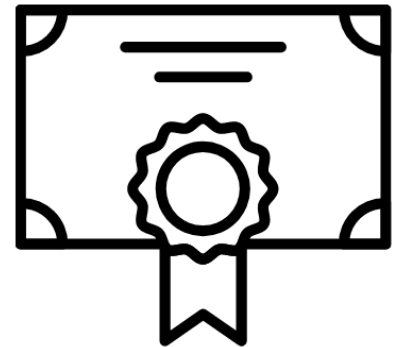
8. Go around to each table until all have given you their answers to question C and shared their most interesting thing.
9. Debrief by sharing all the answers to question C with the class.

Thank participants for sharing.

Certificate of Completion



Every course comes with a Certificate of Completion where the participants can be recognized for completing the course. It provides a record of their attendance and to be recognized for their participation in the workshop.



CERTIFICATE OF COMPLETION

[Name]

*Has mastered the course
Call Center Training*

Awarded this _____ day of _____, 20____

Presenter Name and Title
