FACE TO FACE SELLING SKILLS
MODULE 1 – INTRODUCTION
Pre-Tutorial

ACCOUNT MANAGER'S WORKBOOK

Introduction to the Program

Welcome to the Face to Face Selling Skills Program. This is the Introduction Module in which we shall explain how the Program works and get you ready for the first group Tutorial.

When you are ready to start, turn to the next page and the first topic.

Topic 1 – How does this Program work?

Let’s first talk about how the Program works and then we will discuss why it works. Most of us have attended traditional classroom teaching at some point in our work life. In the traditional model, we attend a one or two-day training seminar in which a trainer explains a number of learning points and we may get to practice some of these ideas in artificial role plays.

A great many studies have been conducted in recent years which show that this traditional approach is not very effective. We just can’t take in all that learning in such a short time and it is tough to apply the new ideas to our real world when we are sitting in a classroom.

So this Program uses a different approach which most people find much more effective.

In this Program we shall use a more flexible approach over a longer period of time so we have plenty of time to understand the concepts and to apply them in our real world.

Here is how it works:

The Program Face to Face Selling Skills is divided into 10 Modules; one Introduction Module (this one), eight teaching Modules and one Review Module.

Each Module consists of online videos, a group Tutorial and a series of tasks and exercises, some of which you may complete on your own, some in small groups and some with another Manager. All the tasks and exercises are related directly to your customers and your business so we don't have any academic exercises.

For each Module, there is a Work Book. The Work Book will either prepare you for the forthcoming Tutorial or help you to apply the learning from the Tutorial you have just attended. You can work through the Work Book in your own time whenever it suits you.

The schedule looks like this:

Pre-Tutorial Work Book (online video, tasks and exercises)

Attend the Group Tutorial

Post-Tutorial Work Book (application of the learning)

Complete the 'Buddy' exercise

Complete the 'Assessed Task' – a piece of work which you will present to your line manager or other manager for review

Pre-Tutorial Work Book for the next Module…and so on

Each Module addresses a new topic as part of Face to Face selling. Some you will be familiar with and other parts may be new.

Each of the topics we discuss has been defined by considering Best Practice. This means that the topics we discuss will each be directly related to best practice capability – in other words we would expect the top performing sales people in the business to have high capability in these areas.

To help focus your learning on these best practice topics, there is a Best Practice Capability Scorecard for each Module. This Scorecard summarises the most important capabilities which we would expect a high performing sales person to demonstrate. Since we all want to operate at the best practice level, we shall use this model to assess our performance. The Module is structured to address each of the Best Practice capability criteria.

Topic 2 – Why does the Program work?

We have already made the point that all the studies show that traditional classroom is not a very effective approach to professional learning. The reasons most frequently cited are:

Not enough time to absorb the material – most of us forget most of the content with a very short time. In fact most of the studies show that you will recall almost nothing within a month of the program

It is hard to be away from your business even for a day – most of us have constant demands from the company and from customers so taking days away from the business is not practical for many Sales Managers. It is not unusual to find Delegates on day-long programs spending much of their time answering emails

You have to apply the material for it to be useful – the classroom is not the real world and for most of us it is hard to apply the concepts in abstract

There is no time to review and revise – most of us need to try the new idea a few times before we get it right - whatever you are doing you will need to experiment and make mistakes before you get it right – traditional classroom training does not allow this

What is the most effective way to learn?
We each learn in slightly different ways; some want to hear about it, some see it, some read about it alone and some to talk about it in a group first.

Whichever way suits you best, the studies show that there are a number of things we can do to make the learning most effective. Here they are:

- If you can explain it then you understand it - once you are confident to explain something the chances are high that you really do understand it
- Long term exposure to the issues allow the ideas to sink in and enable you to experiment
- Talking about the application of the ideas in the real world with others helps to stimulate your own thoughts
- Applying the knowledge (learning by doing) means that you can develop the skills
- Multiple sessions mean that you can discuss your experience (good and not so good) and so make changes

- Use defined best practice to benchmark capability and performance – by summarizing what the highest performers are doing we have an excellent framework to build our model

The Program is structured to include all of these approaches.

This means that you will have different opportunities to experience the material. You will see lecture style presentations (via the video), you will have optional reading (if you prefer to read about things), we will discuss the issues together and you have the opportunities to apply the learning individually, as part of a Buddy pair and as a group.

For example, in the Tutorial the Tutor might ask you to explain the material to the rest of the group. In this approach one person will start the explanation and others will join in with some additional ideas and insight.

The Buddy system

Talking about specific issues with a sympathetic and disinterested person is a very good way to consolidate learning and so we use a Buddy system. Each Manager is paired with one other – your Buddy. Some exercises specifically require you to contact your Buddy at some convenient time to complete an exercise, test an idea or discuss your results.

We will discuss the Buddy model more in the first Tutorial.

Assessed Tasks

In most Modules there will be one Assessed Task. This is a task which is critical to your success (for example preparing a sales presentation) which you will prepare for assessment by another person. Often the other person is your Line Manager, another internal manager and occasionally your Buddy.

The assessment is in the form of a set of questions answered by the assessor. This is not marked in the sense that it contributes to a program mark but rather provides you with a third party view on your output in a formal way. Most Managers find this very useful.

Topic 3 – What will I experience during the Program?

Work Books

You will receive a new Work Book for each Module of the Program. The Work Book will either prepare you for the next Tutorial or help you to apply the learning from the most recent Tutorial.

This is the first Work Book. You can see that it is divided into core 'Topics' and each topic includes some text, directions to watch the relevant teaching video, self-reflection exercises, tasks to use the learning, the Best Practice Scorecard and your Personal Action Plan.

Online videos

Each Module uses a number of video presentations to make the relevant learning points. The videos are short. Experience shows that 4-5 minutes is about the right length for a presentation video. The Work Book will direct you to watch a video and may then ask you to address a question or complete a task.

Now watch the Introduction video for Module 1 (M1U1) called 'Start with the End in Mind'. This video is a short introduction to the Program and highlights the importance of continuous learning.

Example of a self-reflection task

Having watched the video, write notes to answer the following questions:

Do you assess and practice your core selling skills enough?

………

………

………

……..

Why?

………

………

………

………

Be ready to discuss your thoughts in the first Group Tutorial.

Some of the Modules use example role play video. Here we have created simple generic situations to illustrate the main points and we have worked with actors to voice the parts. The idea is simply to give you an example of how something might work and so to give us a good platform for our group discussion. It is not supposed to be high drama – just a simple illustration.

Example of the role play illustration video

Now watch the video in Module 3 Unit 3 (M3U2) 'The feature dump'. This is an example of a role play illustration of the sales person who can't stop talking.

The Group Tutorial

To provide the platform to discuss the application of the idea in the Module, you will attend the group Tutorial. The aim is to provide a group platform to discuss, debate, develop and practice the ideas from the Module.

You Manager will give you details of the timing and location for the Tutorial.

Please aim to arrive at least 10 minutes before the start so that you have enough time to get ready, get a cup of coffee and prepare for the Tutorial. We always start on time.

Format of the Tutorial
Each Tutorial will start with a rapid welcome and then spend a few minutes reviewing the main points from last time. If you have questions from the last Module this is a good time to raise them.

The Tutorial will then address each of the core topics. You will have already prepared for some of the topics in detail so less time will be devoted to these.

One of the best ways to ensure understanding of a topic is to explain it to others, so you will have the opportunity to explain the different points made in each Module to the group (once you have become familiar with the topic of course).

There will be topics for discussion, exercises for smaller groups and time for problem solving.

Additional support
There may be some areas where you have more questions or want more time to think through specific issues. You have a number of options – you could ask a colleague internally to help or you could ask your Group Buddy or another Group Participant to spend some time with you discussing the issues.

You can also can additional more formal 1-1 coaching support from your Manager or a Company Coach.

Topic 4 – Thinking about your own situation - Preparation for the Tutorial

To help prepare for the first Tutorial, think about your current situation and answer these questions…

What are you most looking forward to?

………

………

……

Which area of Face to Face selling do you want to develop particularly ?

………

………

……

What would success look like for you at the end of the Program?

………

………

That is everything we shall discuss in this first Work Book. We will look forward to seeing you at the first group Tutorial.

FACE TO FACE SELLING SKILLS

MODULE 1 – INTRODUCTION

Post-Tutorial

ACCOUNT MANAGER’S WORKBOOK

KEY ACCOUNT MANAGEMENT

Post Tutorial Work Book

Welcome to the second part of the Module 1. This Work Book covers the post-Tutorial activity.

When you are ready to start, turn to the next page and the first Task.

Topic 5 – Personal Objectives and Action Plan

Individual Task – part 1

Setting objectives is a good way to focus your efforts for the Program and to measure your progress. Use the form below to set your own personal objectives for the program.

Personal Development Plan

Your Personal Development Plan (PDP) will help you to acquire new or develop existing skills and approaches so you can:

- **enhance your performance in your current role**
- **plan ahead for possible changes in your current role**
- **learn and practice new skills for you next role**

You can use the Scorecards in each Module to help identify your specific development needs in each topic.

It is well worth getting a view from your line manager or a colleague to add some level of objectivity.

You should refer to your development plan regularly – at least every two weeks - to see how you are progressing.

Personal Development Plan: Terminology and format

We have aimed to keep this format very simple.

Development Objectives- these are the specific objectives you have selected to help you to move towards best practice – make sure they are clear and measurable.

The Priority column helps think about the importance of this development for you. It might be:

1. **important in your current role**
2. **beneficial but not important in your current role**
3. **important in your planned future role**

In the Support column you can list the support you will need - this will include the module material and perhaps input from your manager, colleagues, coaching, practice and so on.

When you review you should:

- **Assess your progress to date**
- **Reflect on your learning**
- **Get input from a third party (line manager, colleague, etc.) for objectivity**
- **Consider whether any aspects of the plan need to be amended**
- **Identify factors that may have prevented you from achieving your development objectives – how will you resolve this next time?**

Personal Development Plan: Template

My personal development Objectives are	Priority (1,2,3)	I will do the following activities	I need this support	Due date	Done

Topic 5 – Personal Action Plan
Individual Task – part 2

We use a Personal Action Plan to define the specific tasks you want to set for yourself for the coming weeks as a result of the work we have done in the Module. We shall review your progress each time we meet.

Use the format on the next page to define your progress so far – what have you achieved in the Program to date? – and the things you plan to do in the coming few weeks.

My Personal Review and Action Plan

I have achieved the following so far

As a result of this Module, I will do the following

What?	By when?	Done?

Topic 6 – Introductory Buddy task - Buddy Task

To help you start working with your Buddy make a time in the coming week to discuss the following together:

What have you found most useful so far?

………

………

………

What surprised you?

………

………

………

What will you do differently as a result?

………

………

………

Topic 7 – Personal Objectives

Assessed Task – part 1

Present and discuss your Personal Objectives summary with your preferred Assessment Manger to get their input and where necessary agree their support.

Topic 7 – Personal Objectives - Assessed Task – Manager's Review

Having reviewed the Personal Objectives summary, are you satisfied that the Sales Manager:

Has clarity about what he or she wants to achieve? **Yes/No**

Has thought about how this will be achieved? **Yes/No**

Has identified the support necessary? **Yes/No**

Has confidence and motivation to complete the objectives? **Yes/No**

Comments:
………
………
………

Signed: Name: Position:

You have now completed the post-Tutorial Work Book for Module 1.

Next you will receive the Work Book for the pre-Tutorial work for Module 2.