FACE TO FACE SELLING SKILLS
MODULE 6 – CUSTOMER NEEDS ANALYSIS
Pre-Tutorial

ACCOUNT MANAGER'S WORKBOOK

Welcome to Module 6 – Customer needs analysis

Welcome to Module 6 of Face to Face Selling Skills. In this Module we shall explore the core skills of customer needs analysis.

Understanding the customer needs lies at the very heart of best practice selling. In this Module we shall explore some of the techniques used to uncover the stated and unstated needs.

This WorkBook contains the preparatory work for the Group Tutorial.

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

Topic 1 – It is all about needs

Watch the first video in Module 6 – Introduction. This video considers why the understanding the customer needs is so important.

We can consider needs in two broad areas – the customer's core or strategic needs (those things it must have to compete effectively) and those short term or more tactical needs which may be related more directly to your product or service.

Understanding the customer's strategic needs is by far the more important because this knowledge will enable you to position your products and services in such a way as to impact on the customer's strategy. Few of your competitors will be able to do this and so you will be at a competitive advantage.

Then answer the following question:

Select one of your customers – do you feel confident to state their top three strategic needs right now? If so what are they?

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Topic 2 – Asking questions

Now watch Video 2 in Module 6 (M6U2) which discusses the different types of questions we can use.

We can think about questions as open or closed and either is more useful in different circumstances.

In your own situation, when do you find a closed question most useful?

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Think about you next sales meeting - what would be good open questions to use at the start?

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Now watch video 2b - the role play example which shows how questions can be used at the start of the meeting.

What might you have done differently in this situation?

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Topic 3 - Selecting questions

Now watch Video 3 in Module 6 (M6U3) The First Few Words, which discusses how to introduce yourself and the meeting.

Self-reflection exercise

What are your thoughts having seen this video discussion?
Has it caused you to consider changing anything about your current approach?

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Topic 3 – Selecting questions

The general approach suggested in the video is this

- **Overall what is happening?**
- **Specifically what is happening?**
- **What does that mean – or what is the impact?**
- **What could the solution look like?**

What is your view of this approach?

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Now watch Video 3a in Module 6 (M6U3a) Role Play.

What are the most useful points for you in this example?

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What changes would you make? What would you do differently in this situation?

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Topic 4 – Creating the need with questions

In some cases the customer has not recognized a need because he or she is not familiar with potential better solutions to the current offer. In this case asking questions is the best way to help the customer realise that there might be a better solution.

Now watch video 4 in Module 6 (M6U4) which discusses creating the need.

Consider one of your customers for whom you could have a good solution but who does not see a need currently - List the questions you could use to help develop the need.

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Now watch Video 4a in Module 6 (M6U4a) Role Play.

What are the most useful points for you in this example?

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What changes would you make? What would you do differently in this situation?

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Topic 5 -Explaining the ideas - Preparation for the Tutorial

The best way to ensure that you fully understand a topic is to explain it to someone else. Please be ready to explain the following at the Tutorial…

Explain the difference between open and closed questions and when each is best used

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How should you plan your questioning approach?

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How can you use questions to uncover a need?

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Next step

Now that you have completed all of the pre-Tutorial work, we will look forward to seeing you at the next group session.

FACE TO FACE SELLING SKILLS
MODULE 6 – CUSTOMER NEEDS ANALYSIS
Post-Tutorial

ACCOUNT MANAGER'S WORKBOOK

Post Tutorial Work Book

Welcome to the second part of the Module 6. This Work Book covers the post-Tutorial activity.

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

Topic 1 – Planning your questions

Individual Task – part 1

Select your most important customer visit in the coming two weeks, consider the questions you should ask:

Opening questions

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Core information questions

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Closed questions

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End of meeting questions

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Topic 2 – Questions - Buddy Task

Now you have a clear understanding about how to ask questions.

Consider the following questions – then make a time to review your answers with your Buddy:

What questions work best for me when starting the meeting?

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What are the most useful questions during the meeting?

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What is the most important thing I have gained from this Module?

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Topic 3 – Customer needs analysis

Assessed Task

Consider one of your customers which you believe you know well and which you will visit soon. Write down your view of their core needs.

Take this list to the customer meeting and present it to the customer to get his or her input.

Compare how closely your views matched theirs.

This is a useful technique to use in general because it prompts the customer to add to your initial list and leads to a deeper customer understanding.

You may want to repeat this exercise a few times with the same and different customers. The measure of success is that you can present a list of the customer's core needs which the customer will agree to. By the way this is one of the techniques we use in the more advanced program of Joint Business Planning. Afterwards review the results with your line manager.

Topic 3 – Starting the sales meeting - Assessed Task – Line Manager's Review

Having reviewed the results of the Assessed Task on Customer Needs Analysis, are you satisfied that the Sales Person:

Understands this customer and its core needs?   **Yes/No**

Is using questions appropriately to uncover needs?   **Yes/No**

Is able to tell you how he or she can uncover hidden needs?   **Yes/No**

Will be able to present a suitable solution to meet these needs?   **Yes/No**

Comments:

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Signed: Name: Position:

Module 6 - Key Points Summary

Use this summary to remind yourself about the key points in this Module – note any point which is not clear and raise this at the next Group Tutorial

- **Understanding the customer and the customer's needs is critical to effective selling**
- **Many customers claim that sales people who meet them do not really understand them and are unable to present specific solutions**
- **Needs are uncovered by effective questioning**
- **Closed questions demand a yes/no response**
- **Open questions generate more information**
- **Open questions are more effective at the start – closed questions to get agreement**
- **Open questions typically start with – who, what, where, when, why , how**
- **You can replace the single question word with a phrase – such as – can tell me more about…**
- **The tone you use is important**
- **Your questions should form a logical flow to reach a conclusion**
- **You can use questions to uncover an unrecognised need**
- **Known what important points and questions you want to establish and ask at the very start**

My Capability Scorecard

Complete the Scorecard for Module 6. Identify any issues which need further development. You can discuss these in the next Group Tutorial if you would like input from the Group or with your Group Buddy, your Line Manager or by booking a one-to-one coaching session with a Group Coach.

CAPABILITY BEST PRACTICE SCORECARD - SELLING SKILLS MODULE 6 CUSTOMER NEEDS ANALYSIS			
This Scorecard defines the Best Practice for Module 6 of the Face to Face Selling Skills Program – Customer Needs Analysis. Having completed the Module, each Delegate should be able to answer 'Yes' with a high confidence level for each of the 10 Best Practice Criteria			
Best Practice Component	Yes/No	My confidence level (1-10)	Is there anything I must do to improve this?
1 I recognise the critical importance of understanding the customer's needs			
2 I can explain how to use open and closed questions			
3 I know the six core open questions			
4 I can explain how to use the six core open questions			
5 I understand the idea of the questioning flow or sequence			
6 I can explain how to use questions to create a need			
7 I have defined the core needs of my customers			
8 I have tested mu understanding with the customers			
9 I plan answers to questions I expect from the customer			
10 I plan my core questions to be used before the meeting starts			

My Personal Review and Action Plan

I have achieved the following since the last Module

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

What?	By when?	Done?