FACE TO FACE SELLING SKILLS

INTRODUCTION TO THE PROGRAM

LINE MANAGER'S INTRODUCTION& ROLE

Introduction to the Program

Dear Line Manager,

One or more of your Sales People or Account Managers is enrolled in the Face to Face Selling Skills Program.

This Introduction has been written for you the Line Manger and will explain how the Program works and how you can support your direct reports throughout the Program.

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.

The value of the training is not so much the training itself but the application of the training; it is the application of the learning which differentiates effective skills development.

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 that the individuals have plenty of time to understand the concepts and to apply them in their real world.

Here is how it works:
The Program Face to Face Selling Skills is divided into 10 Modules; one Introduction Module, eight teaching Modules and one Review Module. The Tutorial can be delivered by you, a colleague, a third party or one of our team. We can train you or your colleagues to deliver the Tutorial and provide you will the supporting documentation.

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

You can run the Program over any time period to suit you and your business. For illustration, let's assume that you run the entire program over 20 weeks; this means that you will address one Module (one core topic) every two weeks. Each Module has two Work-Books; one pre and one post the Tutorial.

Every week the Sales Person will receive a Work Book. The Work Book will either prepare the Sales Person for the forthcoming Tutorial or help him or her to apply the learning from the Tutorial just attended. The Sales People can work through the Work Books in their own time whenever it suits them.

The schedule would look like this:

Week 1	Pre-Tutorial Work Book (online video, tasks and exercises)
	Attend the Group Tutorial
Week 2	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
Week 3	Pre-Tutorial Work Book for the next Module…and so on

Every two weeks we shall address a new topic as part of Face to Face selling. Some topics will be familiar 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 to have high capability in these areas.

To help focus the 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 performance. The Module is structured to address each of the Best Practice capability criteria.

As the Line Manager, you are encouraged to review the completed Scorecard with the Sales Person and to question the score the Sales Person has given him/herself. In particular you should ask for evidence, either written or verbal, that the Sales Person really does understand the point.

Program Modules

Module 1	Introduction
Module 2	Selling Fundamentals
Module 3	Common Mistakes to Avoid
Module 4	Preparation for the Sales Meeting
Module 5	Starting the Sales Meeting
Module 6	Customer Needs Analysis
Module 7	The Sales Presentation and Close
Module 8	Dealing with Questions and Objections
Module 9	Post Meeting Actions
Module 10	Program Review

Topic 2 – Why does the Program format work?

We have already made the point that most studies show that traditional classroom training is a less 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 very little indeed within a few months 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 two or more days away from the business may not be practical. 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 the Sales People will have different opportunities to experience the material. They will see lecture style presentations (via the video), have optional reading (if you prefer to read about things) found via the KAM Journal site, will discuss the issues together and have the opportunities to apply the learning individually, as part of a Buddy pair and as a group.

For example, when we deliver the Tutorial, we ask the Sales Person to explain how he or she will apply the material to the real customers and prospects. In this way we can ensure that everyone understands the concepts and others can contribute 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 Delegate is paired with one other – the Buddy. Some exercises specifically require the Sales Person to contact the Buddy at some convenient time during the week to complete an exercise, test an idea or discuss results.

Assessed Tasks

In most Modules there will be one Assessed Task. This is a task which is critical to success (for example preparing a sales presentation) based on established sales best practice. For the Assessed Task, the Sales Person will prepare a short presentation or document which will be presented to you the Line Manager for review and assessment. This is your way to ensure that the Sales Person is absorbing and using the learning in the real world.

Once the Sales Person has presented the work to you, you will be asked to assess the work using a number of guided questions. The questions relate to your assessment of the Sales Person's ability. You will also be asked to comment where applicable and to discuss your view with the Sales Person.

In most cases you will be satisfied with what you have seen although you may have some additional advice to support the Sales Person. In a few cases you may want to the Sales Person to revise some aspect of the work and occasionally to repeat the task in its entirety.

This assessment is not marked in the sense that it contributes to a program mark but rather provides the Sales Person with a third party view on progress in a formal way. Most Delegates find this very useful.

Topic 3 – What will the Sales Person experience during the Program?

Work Books

The Sales Person will receive a two Work Books for each Module of the Program. The Work Book will either prepare for the next Tutorial or help to apply the learning from the most recent Tutorial.

Just like this summary, the Work Book 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 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 the Sales Person to watch a video and may then ask them 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 Sale People's selling skills enough?

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Why? What could be done to improve the situation?

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Some of the Modules use example role play video. Here we have created simple generic situations to illustrate the main points. Some use animation and others use 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. We can substitute these generic examples and role plays for ones which are specific to your business and specific situation if you prefer.

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

Every two weeks the Sales People will attend the group Tutorial. The Tutorial lasts for 90 minutes so we keep things moving quickly. The aim is to provide a group platform to discuss, debate, develop and practice the ideas from the Module.

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. We address questions from the last Tutorial at this time.

The Tutorial will then address each of the core topics. The Sales People 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 the Sales People will have the opportunity to explain the different points made in each Module to the group (once they 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 a Sales Person has more questions or wants more time to think through specific issues. There are a number of options – the Sale Person could ask you or a colleague internally to help or could ask the Group Buddy or another Group Participant to spend some time discussing the issues.

The Sales Person can get more formal 1-1 coaching support from a Group Coach. All the Group Coaches should have an external qualification in coaching.

Topic 4 – Personal Objectives and Action Plan

Setting objectives is a good way to focus efforts for the Program and to measure progress.

The Sales Person will be asked to use the form below to set his or her own personal objectives for the program. You should make time to review and discuss these objectives and to review progress every couple of weeks.

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

Different organisations will use different terminology and formats – we have aimed to keep this format very simple; feel free to change the terminology and format to suit your organisation and personal preference.

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

We use a Personal Action Plan to define the specific tasks the Sales People want to set for themselves for the next two weeks as a result of the work we have done in the Module. We shall review progress each time we meet.

The template form appears below. Please make time every two weeks for a quick review with the Sales Person.

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 – Thinking about your own Sales People

To help prepare, think about your current situation and answer these questions…

What are you hoping the Sales Person will get from the program?

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

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

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That is everything we shall discuss in this first Introduction.

Program Assessed Task Sheets

The following assessment sheets refer to each of the Module's Assessed Tasks.

There are 10 Modules and so 10 Assessment Task review sheets for you.

Module 1 – Personal Objectives - Assessed Task – Manager's Review

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

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:

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Signed: Name: Position:

Module 2 – Customer Segmentation - Assessed Task – Manager's Review

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

Has clarity about how to segment his/her customers?	**Yes/No**
Has identified the criteria for the Profile customer?	**Yes/No**
Has gained the right level of learning from this task?	**Yes/No**
Has clarity about what can be done differently to improve performance?	**Yes/No**

Comments:

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Signed: Name: Position:

Module 3 - Listening skills - Assessed Task – Audience Review

Having listened to the short presentation on listening skills, are you satisfied that the Sales Person:

Has understands the main listening skills?	**Yes/No**
Has been able to explain the ideas to you so that you understand them?	**Yes/No**
Has been able to provide useful examples of each?	**Yes/No**
Would be a good person to have in a sales meeting?	**Yes/No**

Comments:

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Signed: Name: Position:

Module 4 – Call preparation - Assessed Task – Manager's Review

Having reviewed the results of the Assessed Task on Call Preparation, are you satisfied that the Sales Person:

Has clarity about the call objective?	**Yes/No**
Has done the right level of research?	**Yes/No**
Has anticipated the likely customer attitude and needs?	**Yes/No**
Is fully prepared to conduct this sales call?	**Yes/No**

Comments:
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Signed: Name: Position:

Module 5 – Starting the sales meeting - Assessed Task – Manager's Review

Having reviewed the results of the Assessed Task on Starting the Sales Meeting, are you satisfied that the Sales Person:

Has clarity about the impact s/he wants to make? **Yes/No**

Knows how to make the right impact? **Yes/No**

Has carefully thought about how to start the meeting? **Yes/No**

Has defined the important points to understand at the start of the meeting? **Yes/No**

Comments:
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Signed: Name: Position:

Module 6 – Starting the sales meeting - Assessed Task – 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 7 – The sales presentation - Assessed Task – Manager's Review

Having reviewed the results of the Assessed Task on The Sales Presentation, are you satisfied that the Sales Person:

Understands this customer and its core needs?	**Yes/No**
Has a solution to meet the needs?	**Yes/No**
Is able to present the solution to appeal to the customer?	**Yes/No**
Have clarity about how to close the sale?	**Yes/No**

Comments:
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Signed: Name: Position:

Module 8 – The sales presentation - Assessed Task – Manager's Review

Having reviewed the results of the Assessed Task on the most common questions and objections, are you satisfied that the Sales Person:

Has defined and developed strong answers for the most common questions? Yes/No

Has defined and developed strong answers for the most common objections? Yes/No

Is able to identify and answer the question you don't want the customer to ask? Yes/No

Has identified and prepared supporting material where appropriate? Yes/No

Comments:
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Signed: Name: Position:

Module 9 – Post meeting actions - Assessed Task – Manager's Review

Having reviewed the results of the Assessed Task on the most post meeting actions, are you satisfied that the Sales Person:

Has a workable method to capture the actions? **Yes/No**

Has defined the necessary actions? **Yes/No**

Has a workable method of communicating internally to? **Yes/No**

Has considered how to follow up effectively with the customer? **Yes/No**

Comments:
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Signed: Name: Position:

Module 10 – Program review - Assessed Task – Manager's Review

Having reviewed the results of the Assessed Task on the Program Review, are you satisfied that the Sales Person:

Has developed as a sales person? **Yes/No**

Has been able to absorb and utilize the learning? **Yes/No**

Has had a commercial impact on the business which justifying the investment? **Yes/No**

Will continue to develop personally after the program? **Yes/No**

Comments:
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Signed: Name: Position: