SALES OVER THE PHONE

INSTRUCTOR GUIDE

1/2-DAY COURSE

SALES OVER THE PHONE

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Instructional design and learning philosophy

We are committed to providing the best core skills content possible for Instructor-Led Training (ILT). The following principles are applied in the development of programs:

Sound Instructional Design

All course content is developed using a variety of research techniques. These include:

- Brainstorming sessions with target audience
- Library research
- Online research
- Customer research (focus groups, surveys, etc.)
- Subject Matter Experts (SME)
- Interviews with trainers

Expert instructional designers create imaginative and innovative solutions for your training needs through the development of powerful instructional elements. These include:

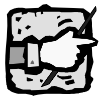
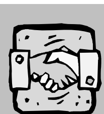
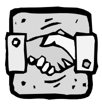
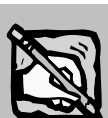
- Learning objectives — effective tools for managing, monitoring and evaluating training
- Meaningfulness — connects the topic to the students' past, present and future
- Appropriate organization of essential ideas — helps students focus on what they need to know in order to learn
- Modeling techniques — demonstrate to students how to act and solve problems
- Active application — the cornerstone to learning — helps students immediately apply what they have learned to a real-life situation
- Consistency — creates consistent instructions and design to help students learn and retain new information
- Accelerated learning techniques — create interactive, hands-on involvement to accommodate different learning styles

Application of Adult Learning Styles

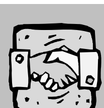
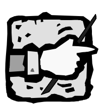
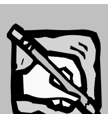
Adults learn best by incorporating their personal experiences with training and by applying what they learn to real-life situations. Our experienced instructional designers incorporate a variety of accelerated learning techniques, role-plays, simulations, discussions and lectures within each course. This ensures that the learning will appeal to all learning styles and will be retained.

Course timing

Module One: A Day in the Life of a Sales Superstar

Type of Activity	Segment	Time
	Introduction to organizing your day	15
	Four parts to your day	20
	Time management: What is your time worth?	15
	Analyzing your time	15

Module Two: Understanding the Sales Process Over the Phone

	Three-part sales process	15
	Gaining trust over the phone	15
	Taking good notes	15
	Finding good leads	


Reading


Written Exercise


Facilitation


Group Activity


Reading

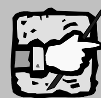
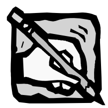
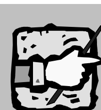

Written Exercise


Facilitation


Group Activity

Course timing

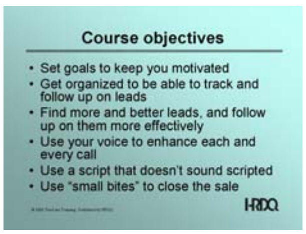
Module Three: Anatomy of a Successful Call

Type of Activity	Segment	Time
	The initial call (prospecting)	15
	The follow-up call (cultivating)	15
	The closing call (harvesting)	15

Contents

Review the course objectives.

Ice-breaker activity: Have participants work in small groups — introduce themselves, etc., and have them share their worst/tackiest sales line they have ever heard used. Share with the entire group



Course objectives

Successful completion of this course will increase your knowledge and ability to:

Set goals to keep you motivated

Get organized to be able to track and follow up on leads

Find more and better leads, and follow up on them more effectively

Use your voice to enhance each and every call

Use a script that doesn't sound scripted

Use small bites to close the sale

Module One

A DAY IN THE LIFE OF A TELEPHONE SALES SUPERSTAR

Organizing your day

Using a CRM

CRM stands for Client Relationship Management, and using a good one is an essential tool for every salesperson. Every software package will have its own features and benefits; however, all should have these key characteristics.

Simple to use

Concise

Offers a place to put quality (i.e. lengthy) notes

Gives you a built-in follow-up system

Ability to categorize clients

Five parts to your day

Step 1: Pull up your CRM and check follow-ups for the day

Step 2: Do follow-up activities

Step 3: Prospect/research leads

Step 4: Handle administrative tasks

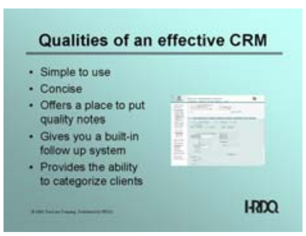
Step 5: Create tomorrow's "to do" list

Introduction: You might think a sales superstar is all about the perfect opening line or sales pitch. However, becoming a sales superstar is much more nuts and bolts than that. It starts with basic organization, and for that, your CRM (client relationship management system) is your lifeline.

Ask how many participants already use a contact management system/client relationship system. If some participants feel strongly about their system, ask why. Chances are, they will reiterate the points listed in the workbook.

Some popular CRM programs:

- ACT!
- Gold-Vision
- Microsoft CRM/Outlook CRM
- Salesforce.com



One way to categorize clients is by how often you contact them. For example, clients you contact monthly, every other month, quarterly, twice a year, etc.

Provide a brief overview to the five parts of the sales superstar's day. The benefit to this structure (follow-up calls in the morning, lead calls after lunch, routine stuff at the end of the day and finally, plan for the following day) is that you automatically do your highest priority items first (and for most people, this is when you're freshest).

Step 1: Pull up your CRM and check follow-ups for the day

Trying to decide what's most important? Ask these questions:

If I can only accomplish one task/activity today, what should it be? Two activities? Three activities? Etc.

What activities, if I postpone them, will damage my relationships with others?

What activities, if I don't do them, will complicate my day tomorrow or in the future?

Step 2: Do follow-up activities

Discovery/qualifying calls

E-mails

Send information/materials

Set up conference calls

Step 3: Prospect/research leads

Read industry trade magazines

Search Hoovers for data and key names

Step 4: Handle administrative tasks

Send out proposals/information packets

Complete routine paperwork, reports, etc.

Step 5: Plan tomorrow's activities

Create "to do" list

Step 1: Check follow ups. If you have many follow up activities scheduled for the day, how do you decide in what order to do them? Use the questions in the workbook to help you prioritize.

Prospecting/researching could be an entire program on its own. We've listed a couple basic tips, and we'll look at prospecting in more detail later.

Nowadays, many follow-up activities can be handled through e-mail (this is the preferred mode of communication for many customers/clients/prospective customers).

Handle administrative tasks: It's so easy to let routine paperwork pile up, especially filing. If you take care of it daily, it will remain under control.

Plan tomorrow's activities: Your "to do" list will include appointment and meetings scheduled for the day. You will probably tweak your list in the morning as you review and prioritize your follow up activities.

Time management

What is your time worth?

How much money are you losing on wasted time?

Calculate your hourly rate

$$\frac{\text{Gross income}}{\text{Total annual working hours}} = \text{Hourly rate}$$

Example

$$\frac{\$30{,}000}{2{,}000} = \$15$$

Your hourly rate

$$\frac{\qquad\qquad}{\qquad\qquad} =$$

How to add more time in your day

- Set goals
  - # contacts made
  - % leads converted to sales
  - % repeat business
  - $ targets
- Plan your day the night before
- Organize your desk, your files (electronic and hard copy)
- Group similar tasks

Activity: Calculate your hourly rate. Look at the example provided. Annual gross income of $30K divided by 2,000 hours worked per year = $15/hour. $15/hr x 250 days/year = $3,750.

So, whoever said, "Time is money" was right. Using the example provided, if you waste just one hour each day on unproductive activity, you will have spent $3,750 on nothing! After going through the example, have participants calculate their own hourly rate and total dollars wasted per year.

How to add more time in your day: When you set goals, you stay more focused and are less inclined to waste time.

Ask participants what kinds of tasks can be grouped to save time. Typical answers include: Filing, checking e-mail, invoicing, etc.

Analyzing your time

Did I accomplish my high-priority items today?

Did I achieve my goal(s) for the day?

How much time did I spend prospecting for new clients?

Did I contact every prospect I put on my list for today? If not, why not? What prevented me from reaching that prospect?

What is the most productive thing I did today?

What is the least productive thing I did today?

If I could do today over, what would I do differently?

What did I do today that I feel really good about?

Every successful salesperson takes time to reflect. In the beginning (or maybe always) you'll want to ask yourself these questions at the end of everyday. Later, you may choose to use these as a check-in on a weekly or monthly basis.

Making sales is all about delayed gratification — it can be hard to invest time in future business when there is no immediate payoff.