

Introduction to the Course

Instructor's Summary

Content Overview

This activity sets the stage for the rest of the new hire sales training.

Topic Outline

- **Sales Person Versus Consultant Activity.** This discussion compares the words and feelings associated with a sales person to the words and feelings associated with a consultant. The activity uses the comparison to set the stage for the Customer focused sales approach, which is designed to help us become consultants.
- **Course overview.** The topic explains the purpose of the sales training and presents the Customer focused approach.

Key points

- We want to be viewed as consultants in the eyes of our Customers.
- The Customer-focused approach is not linear, all the skills happen throughout the entire sales process.

Topic agenda

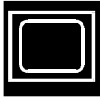
Segment	Time in minutes
Sales Person Versus Consultant	15
Course Overview	5
Total	20

Total time: 20 minutes

15 minutes

Salesperson Versus Consultant

HAVE SLIDE DISPLAYED AS PARTICIPANTS ENTER



Slide



ONCE ALL PARTICIPANTS HAVE ARRIVED WELCOME THEM AND INTRODUCE YOURSELF

Note: Be sure to establish your credibility by explaining your sales experience.

Salesperson Versus Consultant

STATE: To get us thinking about sales, we are going to start with a word comparison.

ASK: When you hear the word Salesperson, what do you think of?

Note: Encourage participants to be honest with their answers.

RECORD ANSWERS ON A FLIPCHART – label the flipchart “ Salesperson”

ASK: When you hear the word Consultant, what do you think of?

RECORD ANSWERS ON A FLIPCHART – label the flipchart “ Consultant”

ASK: So what is it about the two that makes them seem so different?

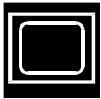
AFTER PARTICIPANTS RESPOND DISPLAY THE FOLLOWING SLIDE AND EXPLAIN



Flipchart



Flipchart



Slide

The “Which do you want to be” text appears on mouse click

Salesperson vs. Consultant

It comes down to motivation

Salesperson	Consultant
<ul style="list-style-type: none"> • Looking out for themselves • Looking for ways they will benefit 	<ul style="list-style-type: none"> • Looking out for the Customer • Looking for ways the Customer can benefit

Which do you want to be?

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The difference really comes down to the motivation of the person. If a person is very self-motivated looking out for him or herself, then he/she will conduct him/herself more like the stereotypical salesperson. If a person is focused on what is best for the Customer then he/she will conduct him/herself like a consultant. Remember, good consulting starts with Customer service.

Note: Throughout the day continue to stress the importance of putting Customer service first then sales.

CLICK THE MOUSE BUTTON TO BRING UP THE QUESTION AT THE BOTTOM

ASK THE FOLLOWING RHETORICAL QUESTION

Which do you want to be? How you are perceived is really your choice because it is based on the motivation and focus you bring.

TRANSITION: Let's look at how that relates to what we're going to cover today.

5 minutes

Course Overview

Purpose

DISPLAY THE FOLLOWING AND READ THE PURPOSE



Slide

Underlines build on mouse click

Purpose

Through discussion and practice you will learn the tips, techniques, and processes to help you successfully sell value added products during a conversation/interaction with a Customer.

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CLICK THE MOUSE TO UNDERLINE “DISCUSSION AND PRACTICE”

EXPLAIN: Today isn't going to be all lecture; your experiences and expertise are valuable. Through activities, discussions, and practice, we will create an environment where we can all learn from each other.

CLICK THE MOUSE TO UNDERLINE “TIPS, TECHNIQUES, AND PROCESSES”

EXPLAIN: To help us improve our skills we will be learning and practicing tips, techniques and process to help us be successful. To make it easier, we have included most of these in your Team Guide.

REFER PARTICIPANTS TO THE TEAM GUIDE.



Reference

“Team Guide”

STATE: The Team Guide will not only help you today, it is designed as a resource that you can refer back to once we leave.

CLICK THE MOUSE TO UNDERLINE “VALUE ADDED PRODUCTS”

EXPLAIN: Our job is to use our sales skills and the tools we have available to assist Customers in seeing the value of their accounts and that could include selling them a product that enhances their accounts and will keep them as lifelong Customers.

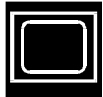
CLICK THE MOUSE TO UNDERLINE "CONVERSATION/INTERACTION"

EXPLAIN: Every conversation/interaction with a Customer is unique. We must remember that Customer service comes first. We will discuss the unique features of selling throughout the day.

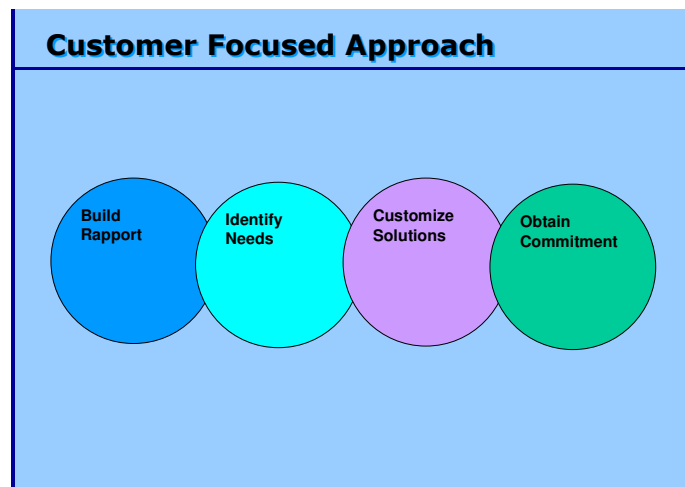
TRANSITION: Let's take a look at what we are going to cover today.

Agenda

DISPLAY THE FOLLOWING SLIDE AND EXPLAIN



Slide

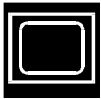


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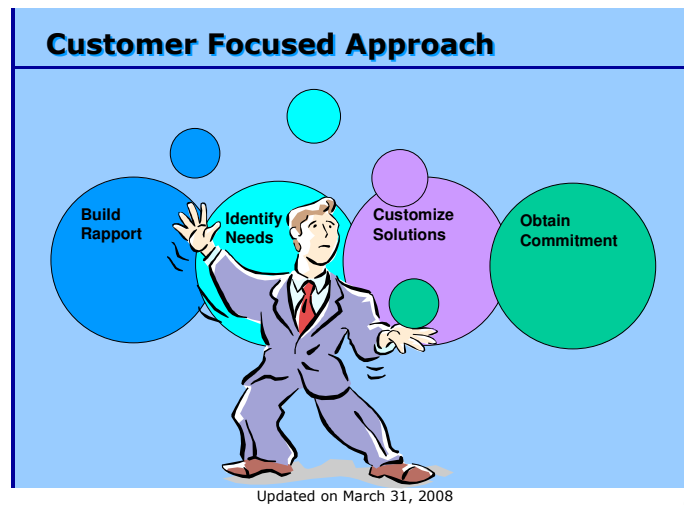
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Today we will be going through a series of modules based around a Customer focused or needs based approach to selling. This may already be familiar to some of you, which is why we want to leverage your experience, but expect to hear and learn some new things along the way.

DISPLAY THE FOLLOWING SLIDE AND EXPLAIN



Slide



While the model appears to be linear, it should not be viewed as a step-by-step approach but rather a list of skills and techniques that we as Advisors need to be doing throughout the call in order to have a Customer focused approach.

Ask: Does anyone have any questions about what we're going to be covering today?