

Module 1: Building Rapport

Instructor's Summary

Content Overview

This module focuses on the importance of Building Rapport and answers several questions 1) What does rapport mean? 2) Why is it important to build rapport? and 3) How do we build rapport?

Topic Outline

- **Module Introduction.** The module begins with a quick overview.
- **What does rapport mean?** Looks at the definition of building rapport and its component parts, such as relationships and trust.
- **Importance of Building Rapport.** Uses an activity to discuss the benefits of building rapport for the Advisor, and the Customer.
- **How do we build rapport?** Participants brainstorm and discuss ways to build rapport through an activity.
- **Module Close.** The module ends with a review of the material covered.

Key Points

- Building rapport is more than just talking about the weather.
- Building rapport should happen throughout the entire call not just the beginning.
- Building rapport will increase Customer loyalty, improve job and Customer satisfaction, and help you sell.

Topic Agenda

Segment	Time in minutes
Module Introduction	5
What does rapport mean?	10
Importance of Building Rapport	10
How do we build rapport?	40
Module Close	10
Total	75

Total time: 1 hour 15 minutes

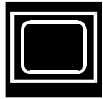
5 minutes

Module Introduction

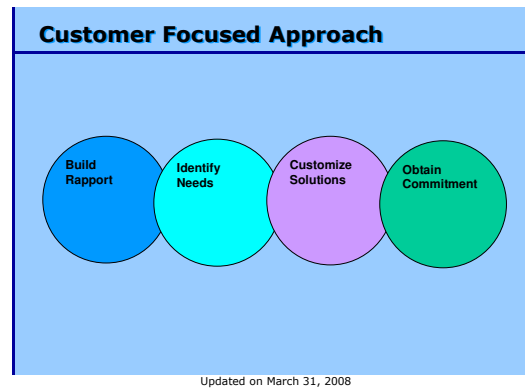
5 minutes

MODULE OVERVIEW

DISPLAY THE FOLLOWING SLIDE AND EXPLAIN

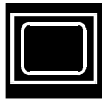


Slide

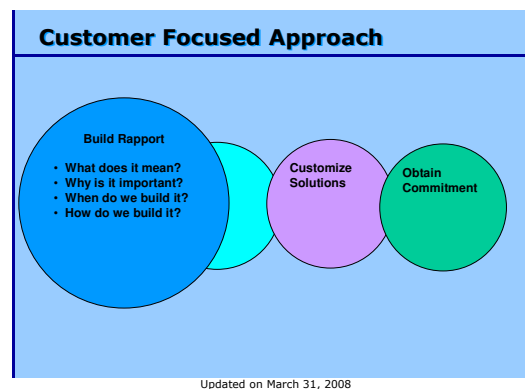


Building rapport appears to be the first step of the Customer focused approach but it is actually something that should be done throughout the entire call. We are going to talk about building rapport and look at it in several areas.

DISPLAY THE FOLLOWING SLIDE AND EXPLAIN



Slide



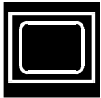
Through a series of discussions and activities we will leverage your experience and best practices and answer several questions about rapport building.

Topic 1

Rapport - What does it mean?

10 minutes

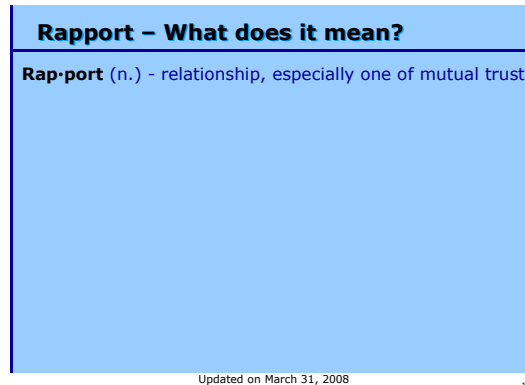
DISPLAY THE FOLLOWING SLIDE



Slide

Slide starts blank and builds in the following order:

- Definition
- First bullet point
- Second bullet point



ASK: How would you define rapport?

GATHER RESPONSES FROM SEVERAL PARTICIPANTS

CLICK THE MOUSE TO DISPLAY THE DEFINITION AND READ ALOUD

STATE: Let's break this down into its parts.

CLICK THE MOUSE TO BRING UP THE FIRST BULLET POINT

STATE: Building rapport is actually building relationships. Making small talk is a good start toward building rapport, but to truly build relationships and be seen as a consultant we need to go further. We need to establish trust. We'll talk more about the specific things we can do to build rapport later, but first let's look at the other part of the definition.

STATE: You will have an opportunity to come back to these later and think of ways you can apply them during a call.

Topic 2

Importance of Building Rapport

10 minutes

Activity

Take a Stand

MATERIALS

- Two flipcharts

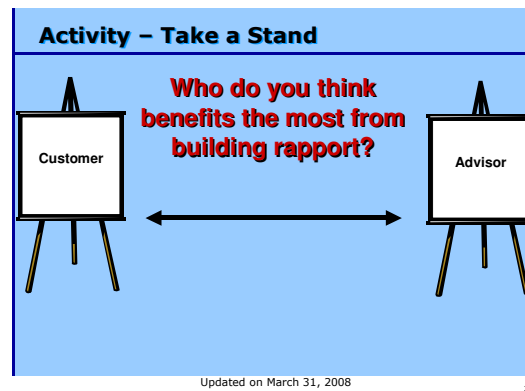
SET UP

- Place the flipcharts at opposite ends of the room.
- Write "Customer" on one flipchart and "Advisor" on the other.

DIRECTIONS**DISPLAY THE FOLLOWING AND EXPLAIN**

Slide

Question builds on mouse click



- Explain the directions.
 - The two flipcharts create a continuum.
 - In a few seconds I will display a question on the slide.
 - To answer the question get up and position yourself along the continuum. For example if you think the answer is totally the Advisor then go and stand directly next to the Advisor flipchart. If you think it is totally the Customer then stand next to that flipchart. If you think it's half and half then stand directly in the middle. If you think it is some other percentage then stand along the continuum accordingly.

CLICK THE MOUSE TO DISPLAY THE QUESTION

- Allow participants time to read the question and move to their answer.

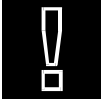
Note: Most if not all of the participants should be on the side of the Advisor. This is the intended outcome.

DEBRIEF

STATE: That's right, it is to our advantage and benefit to build rapport.

ASK: What are the benefits to be gained from building rapport?

Expected answers: builds Customer loyalty, helps deal with difficult Customers, makes our job more enjoyable, and makes it easier for us to sell.



Note: Follow up to participant responses by asking them for examples (such as, How does building rapport make it easier for you to sell?). Encourage participants to share specific real life examples.

ASK: Are there any benefits to the Customer?

Expected answers: peace of mind and confidence in their choice of credit card and the excellent service.

Topic 3

How do we build rapport?

40 minutes

Activity

How to Build Rapport

MATERIALS

- Three flipcharts and markers

SET UP

- Place the three flipcharts around the room.
- Title the flipcharts with the following.
 - Beginning
 - Middle
 - End
- Divide the class into three groups by counting off by threes.
- Position group one by the flipchart titled "Beginning", group two by the flipchart titled "Middle" and group three by the flipchart titled "End."

DIRECTIONS

DISPLAY THE FOLLOWING SLIDE



Slide

Question builds on mouse click

Activity – How do we build rapport?

What can we do to build rapport during each stage of the call?

Think about ways you can establish the types of trust.

- **Contractual Trust:** People need to experience you keeping your word.
- **Disclosure Trust:** To build trust, you must demonstrate the willingness and ability to openly share information with others.
- **Competence Trust:** People need to experience you as having the skills to do what you say you can do.
- **Trust of Intentions:** People need to realize you have their best interests at heart and that you are not "out to get them."

Updated on March 31, 2008

14

- Explain the directions.
 - In a moment I will reveal a question, which you will answer by writing your responses on the flipchart.

Note: Remind participants to write clearly, others will be reading their writing.

- You will have three minutes to formulate your answers.
- After three minutes you will rotate to the next flipchart where you will review the answers of the prior group and add new ideas.
- The process will continue for the third flipchart.
- During the last round you will return to your original flipchart and will complete the final round.

- Click the mouse to display the questions and begin the activity.
- Announce the end of each round and facilitate participants rotating to a new flipchart.
- When participants have returned to their original flipchart, display the following and explain the directions for the final round.



Slide

Activity – Final Round

- Review the comments written by other groups
- Determine and label which comments can establish what types of trust
 - **Contractual Trust:** People need to experience you keeping your word.
 - **Disclosure Trust:** To build trust, you must demonstrate the willingness and ability to openly share information with others.
 - **Competence Trust:** People need to experience you as having the skills to do what you say you can do.
 - **Trust of Intentions:** People need to realize you have their best interests at heart and that you are not "out to get them."
- Be prepared to share your answers

Updated on March 31, 2008 15

- Review the comments written by the other groups.
- Be prepared to share your answers.

DEBRIEF

- Start with the group assigned to the "Beginning" and have them share the information on their flipchart. Continue until all groups have shared their information.

Note: As groups share their responses ask the following questions to promote more discussion.

- What specific words and phrases do you use?
- How do you think the Customer feels when we do this?
- What would happen if we didn't do this?
- How many of you use this technique?
- Can anyone give me an example of when they have used this?

DISTRIBUTE THE HANDOUT AND COVER ANY POINTS THAT WERE NOT DISCUSSED DURING THE ACTIVITY.

- Handout is actually in Sales Training Team Guide

(Refer to the last page in this module for instructor reference copy.)

Note: Be sure to stress the importance of good service to a Customer as a means to build rapport. Servicing the Customer first will increase sales.

TRANSITION TO MODULE CLOSE



Reference

"Techniques for Building Rapport"

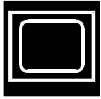
We have talked about a lot of best practices and experiences that you have building rapport. Let's review what we've learned before we move on to Identifying Needs.

5 minutes

Module Close

Content Review

DISPLAY THE FOLLOWING SLIDE AS A REVIEW



Slide

Questions and answers build separately on mouse click.

Module 1: Content Review

- When should we build rapport during a call?
 - We should be building relationships throughout the entire call?
- What are the benefits of building relationships?
 - Builds Customer loyalty, helps deal with difficult Customers, makes our job more enjoyable, and makes it easier for us to sell.
- What techniques will you use to build rapport (think beyond asking about the weather)?

Updated on March 31, 2008

16

TRANSITION: As we continue to look at different skills used in the Customer focused approach, do not forget that rapport building can and should be done throughout the entire call.

Techniques for Building Rapport (instructor reference copy)

Be Positive

- Your tone of voice should be friendly, courteous, helpful, enthusiastic, and positive.
- Always be positive when presenting product information. If you position something with a negative tone, the Customer will see it that way.
- Never be negative about a competitor or other individuals or areas within the business.
- Smile, it will come through in your voice.

Provide good Customer Service

- Provide the Customer with options.
- Explain things clearly and check to make sure the Customer understands.
- Do what is in the best interest of the Customer.
- Be honest and apologize when necessary.
- Use the Customer's name.
- State your name clearly so the Customer can understand.

Speak with Confidence

- If you are confident, and sound confident to the Customer, it will increase his/her trust in you.
- If you are unsure of something, tell the Customer you don't know, but will find the correct information for him/her. Avoid uncertain terms such as "I believe; I think; it's my understanding."

Listen to the Customer

- Give the Customer your full attention.
- Let the Customer know you are listening by using phrases such as "I see; that makes sense; I understand; um hum."
- Ask clarifying questions.
- Paraphrase to check for mutual understanding.
- Do not interrupt the Customer.
- Do not make assumptions about what the Customer wants; every call is different.

Choose Your Words Carefully

- Avoid using jargon it can cause confusion.
- Use empathy statements such as: "I understand why you feel that way; I know how frustrating this can be."
- Avoid words or phrases that sound harsh or negative such as:

Avoid using	Instead use
I can't...	I'm unable to because...however, I am able to do the following...
It's not our policy.	Because it's not a customary procedure, let me see what I can do.
It's required.	Can I ask you to...?
Do you understand?	Did I explain that clearly enough?
You were delinquent.	Your payment was due on (date) and we received it on (date).