Service with a Sale

Increased sales and improved customer experience.

"How to stop selling and help customers buy"

This is an intensive two-day sales and customer service improvement training workshop. It is suitable for indirect or customer-service focused staff. There are four primary objectives for this course:

1. Improve ability and success in attracting new customers
2. Improve customer communication, service and relationships to achieve increased average sales/order value (up- or cross-sell).
3. Increase sales efficiency (closing ratio).
4. Improve the customer's service experience and satisfaction.

A few sample learning points

- ✓ Different methods of creating and generating new business opportunities from inbound calls, customer visits and promotional events.
- ✓ How to identify and approach potential new customers with greater accuracy.
- ✓ Learn and apply the principles of suggestive and customer-focused selling.
- ✓ How to prioritise customers and manage sales time when developing new business.
- ✓ Overcome psychological blocks to selling – yours and the customer's.
- ✓ Increase activity level with customers, including new prospects, networking, exhibitions and gaining referrals.
- ✓ How to increase the conversion of enquires through improved telephone skills and call structure.
- ✓ Become more effective through increasing the quality of customer interaction, eg, better questioning, value-based propositions, handling of price, answering questions and asking for commitment.
- ✓ Be able to sell added-value options around a core purchase or requirement.
- ✓ Make every customer feel special through enhanced service experience.

Main modules

1. **Introduction:** The importance of using service and advanced communication skills to help customers buy more.
2. **Connecting**: Call opening, qualifying, getting in control, advanced rapport, face-to-face and telephone skills, the SPECIAL model.
3. **Consulting skills**: Using 'opportunity questions' to understand and create more needs, active listening, drawing out and summarising skills.
4. **Convince and choose options:** Presenting information skilfully, building options (for up- and cross-selling), test closing.
5. **Commit:** Buying signals, dealing with objections, test closing and gaining final commitment.
6. **Prompt sheet playbook:** Creating a personalised playbook of winning 'prompts' for use when talking to customers.
7. **Service experience:** The importance of regular contact, exceeding service standards and gaining referrals.
8. **End of course summary:** and action plans.

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Service with a Sale: Day 1

Session 1: Introduction, SPECIAL model, 4Cs model

Time	Key points	What happens
9.00 – 10.30	1. Course overview and personal objectives 2. Brilliant Customer Service – how to make every customer feel SPECIAL! 3. 4Cs model – an effective telephone sales model 4. Up-selling and cross-selling – definition and examples	*Group exercise* to review personal objectives (from pre-course task) *Presentation*: Special model *Learning activity:* Special application *Presentation*: 4 Cs model, up/cross selling

Session 2: Connect, Converse and Consult

Time	Key points	What happens
10.45 – 12.30	1. Gaining credibility in the first few minutes 2. Creating a compelling opening 3. Your personal projection – body language, voice and introduction tips and tricks 4. Using high-impact questions to build interest and opportunities for cross- or up-selling. 5. Active listening and summarising	*Presentation*: Connect during the first 30 seconds *Learning activity:* Prompt sheet – Connect *Presentation*: Consult – using questions to build interest and identify opportunities *Learning activity:* Prompt sheet – Consult and identify suitable opportunities for up-selling

Session 3: Convince, Choose options and Commitment

Time	Key points	What happens
1.30 – 2.45	• The convince elements: summarise needs, link to benefits, support with features, discuss options • Using 'hot button' statements to gain customer engagement • Building value: Positioning your offer effectively with the right features, benefits, third party stories and examples • Uncovering customer questions, concerns and objections • How best to present price, overcome concerns and gain agreement	*Presentation*: Convince – keys to help customers make good buying choices in the first 30 seconds *Learning activity:* Prompt sheet – Convince *Presentation*: Commit – presenting price, overcoming concerns and gaining agreement to proceed *Learning activity:* Prompt sheet – Commit

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Session 4: Practice and planning sessions

Time	Key points	What happens
3.00 – 3.45	1. A series of structured role-plays to apply, test and refine prompt sheets created earlier in the day. 2. The SPECIAL model revisited – are you selling with a high level of customer experience? 3. Identify the best prospects for additional sales	*Learning activities:* Multiple role-plays or case studies run in groups of 3-4 participants. Further definition of up- and cross-selling opportunities, especially add-on sales and how to 'create' them.

Session 5: Managing your sales time

Time	Key points	What happens
3.45 – 4.45	1. Managing priorities and meeting deadlines 2. How to structure your day, week and month 3. Making time for prospecting 4. Principles of territory management	*Presentation:* Goal setting, time planning *Learning activities:* Time management quiz *Presentation:* Day/week planner *Presentation:* Prospecting and territory planning *Learning activities:* Planning exercise

Session 6: End of day summary and action plans

Time	Key points	What happens
4.45 - 5.15	1. Action plans	*Learning activity:* Learning Diary

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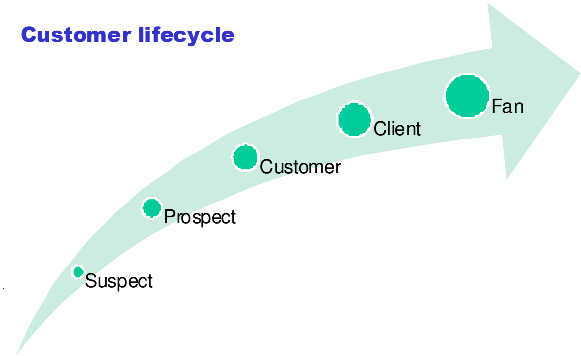
Service with a sale: Day 2

The second day, Part Two, of the program is run 3 to 5 weeks after the first course. It is based around a similar structure ('Connect, consult, convince and commit'), but to a more advanced level and is focused on outbound, proactive calls.



The objectives include:

- Increasing both the quantity and quality of outbound sales calls
- Improve the ability to grow a one-time or one sale customer to a repeat or multi-purpose client.
- Greater telephone sales skills, to an advanced level.
- How to increase conversion by following up quotes more effectively.

Specifically, the focus of the day is to approach existing customers with proposition to consolidate ALL their insurance requirements with Seico, rather like Telecom plus/utility warehouse. It will also look at campaign driven calls, for example cross-selling house contents insurance to motor customers, etc. For commercial agents, B2B examples will be used.

Session 1: Customer value, and the importance or warm calling

Time	Key points	What happens
9.00 – 10.30	• Review of the 4 C's model • The customer value model • Different types of outbound call: when to call, how to structure and what to say • The importance and method of following up outstanding quotes.	*Group exercise* to review progress from session 1 *Presentation*: Customer value model *Learning activity:* Outbound calls to follow-up outstanding quotes - role-plays *Discussion*: Types of call and how to approach

Session 2: Warm calling 1: Connect, Converse and Consult

Time	Key points	What happens
10.45 – 12.30	• How to open the call and lead with your (bold) proposition. • Gaining interest and asking the right questions • Presenting prices, features and benefits • Closing and follow-up	*Presentation*: Demonstration by trainer of possible approaches *Learning activity:* Prompt sheet development *Learning activity*: Role-plays and review

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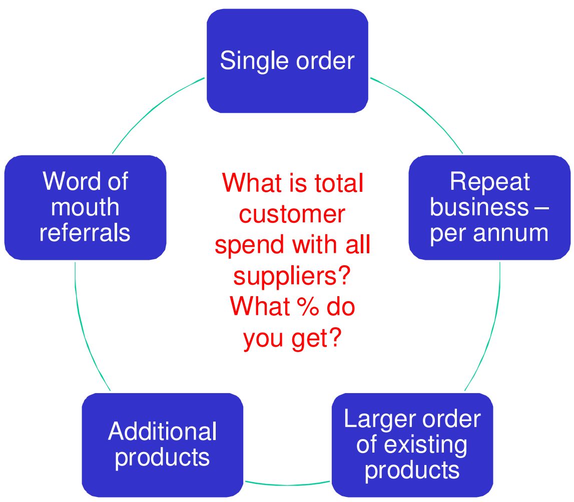
Session 3: Campaign calls and using organised persistence

Time	Key points	What happens
1.30 – 2.45	• How best to structure and conduct outbound campaign, for example cross-selling house contents insurance to motor customers, etc. For commercial agents, B2B examples will be used. • Using the 'organised persistence' approach to build extra revenue for just an hour a day.	*Presentation:* Demonstration by trainer of possible approaches *Learning activity:* Prompt sheet development *Learning activity:* Role-plays *Presentation:* Organised persistence

Session 4: Managing your sales time

Time	Key points	What happens
3.45 – 4.45	• How to make an hour a day to do your warm calling. • The best way to structure yours sales day and week. • Using an effective sales tracking system. • Beating the time bandits. • Setting realistic goals and creating action plans.	*Presentation:* Goal setting, time planning, organised persistence *Presentation:* Organised persistence planning tool. *Presentation:* Time management techniques – practical ways to make time *Learning activities:* Planning exercises

Action plans and summary



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Training style

The training is very practical and objective. Very clear and specific skills, models and techniques are covered. The goal is on improving things that are already working, not going over old ground. Participants will discuss and plan new approaches using real-life examples taken from their own situations.

Each module will feature high quality training presentations, group exercises and team activities and a high degree of participation and interaction.

About Graham Roberts-Phelps

Graham is a specialist training professional with a great deal of experience and expertise in all aspects of customer service – from skills, through to standards and 'systems'.

He has been training, coaching and consulting since 1993, and has personally trained over 20,000 people, in 25 different countries, from hundreds of organisations. These span all industries and types of business. In this time he has developed a unique series of modules and approaches based on what really works, as well as also writing more than ten books on sales, marketing, training and business.

Graham has conducted sales and customer service training and consulting for many different organisations, including Pegasus, Xchanging, My Family Care, Ambius, Travelsphere, Nortel, BT, AIG, Nationwide, Abbey, Apple, Thomson Financial, Cosmos Travel, Intel, Gateway computers, and many, many others including several web-based businesses, franchises and multi-national business.

A unique feature of his customer service is to address both the standards and the skills people use over and above their technical knowledge. The course features his SPECIAL model:

- **S** – Speed and Time
- **P** – Personal and personalised
- **E** – Expectations – manage and exceed
- **C** – Competence and courtesy
- **I** – Information
- **A** – Attitude
- **L** – Long term relationship and follow-through

Each of these points is related explicitly to the jobs people do and their interaction with customers on the telephone, via email or face-to-face.

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Service with a Sale – extract from page one of the training course

Have the right attitude

Have the attitude that you are helping the customer to buy, not just trying to SELL. You are suggesting to and informing the customer about things that they want or need anyway and to get the best products and services they can afford.

By asking the right questions at the right time, and providing the correct products, information and level of personalised service, you are saving them time and money, helping get **better** quality and value as well as providing convenience and peace of mind.

Don't 'handle' or 'process' a customer enquiry – provide ***real*** service. This means engaging the customer in conversation that is of interest to them and **help them get the best choices for them... they will thank you for it!**

- **Stop selling – help customers buy**
- **Only sell to the next stage**
- **Show empathy, build confidence, gain credibility and generate enthusiasm**
- **Use satisfied customers to gain referrals**
- **Differentiate through great products, superior service and relationship**

An ideal call is one where...

1. The customer feels special and important, not just another enquiry 'look-up'.
2. You don't just make a 'one product' sale, you get at LEAST one other option.
3. You speak slowly, clearly and with empathy and enthusiasm.
4. You make the customer smile.
5. You give your name and use the customer's name at least twice.
6. You repeat back information you are given and prompt for more details.
7. You ask good questions to qualify and establish preferences, needs and choices.
8. You check details for the customer's first AND second choice of options.
9. You use good product knowledge and, where possible, personal experience to discuss options.
10. You offer at least ONE upgrade or add-on for every customer, AT THE RIGHT TIME.
11. You include price and benefits in the SAME SENTENCE for ALL prices.
12. You offer the option for a price on additional policies, at a later time.
13. The customer enjoys talking to you, and you them.