"Pair up. One of you will play the buyer using your avatar, and the other will play the seller. Practice your opening conversation. Your goal is not to pitch — your goal is to build trust and connection. After three minutes, switch roles."

- Debrief: Ask 1–2 volunteers what worked and what felt natural.

Quiz (Knowledge Check – 5 min)

Trainer says:

"Before we move on, let's check for understanding."

1. What three elements make up a complete buyer avatar?
    - a) Demographics, hobbies, favorite color
    - b) Demographics, psychographics, motivations ✅
    - c) Age, income, objections
2. True or False: Rapport is built mainly by talking more than the buyer.
    - **Answer:** False
3. Which of the following builds trust fastest?
    - a) Mirroring body language ✅
    - b) Memorizing features
    - c) Talking about yourself

- *Trainer says:*

  "Excellent — now you see how understanding buyers lays the groundwork for everything else in sales."

References & Resources

- *The Trusted Advisor* (Maister, Green, Galford).
- HubSpot resource: "How to Build Buyer Personas."
- LinkedIn Sales Navigator and CRM reporting.

Visual Aids (for Slides or Handouts)

- **Diagram:** Buyer Avatar template (4 quadrants).
- **Infographic:** “Trust Builders vs. Trust Killers.”
- **Image/Metaphor:** A seed planted in concrete vs. in fertile soil.

Wrap-Up (3 min)

- *Trainer says:*

  “Sales success starts with planting the right seeds. When you understand your buyer deeply, you don’t waste time chasing the wrong people, and you connect in ways that build trust and open doors. In our next session, we’ll move into **Engage: Prospecting** — because once you know who you’re looking for, the next step is finding and reaching them.”

Buyer Avatar Worksheet

Chapter 5.1 – Seed: Understanding Buyers

Instructions:

Use this worksheet to create a detailed profile of your ideal buyer. Be as specific as possible — the more detail you add, the clearer your sales strategy becomes.

Step 1: Demographics (Who are they?)

- Age Range: _____
- Gender: _____
- Job Title / Role: _____
- Industry: _____
- Company Size (Revenue / Employees): _____
- Location / Market: _____

Step 2: Psychographics (What do they value?)

- Goals / Ambitions:

  _____

- Personality Traits:

  _____

- Decision-Making Style (data-driven, relationship-driven, etc.):

  _____

- Values & Beliefs:

  _____

Step 3: Motivations (Why do they buy?)

- Primary Business Challenges:

- Pressures / Pain Points:

- Desired Outcomes (What does success look like for them?):

- Emotional Drivers (fear, recognition, security, growth, etc.):

Step 4: Buying Triggers (When do they buy?)

- Common Events or Triggers (e.g., budget cycle, new project, missed target):

- Typical Objections:

- Key Influencers in Decision:

- Average Buying Timeline:

Summary Statement (1–2 sentences)

Write a short description of your buyer avatar:

Example: "Our ideal buyer is a mid-level operations manager at a growing logistics company who values efficiency, feels pressure to cut costs, and is motivated by tools that make her team more productive without adding complexity."

🌱 Module 1 Wrap-Up of Strategize: Understanding Buyers

✅ Recap of the 3 Steps

1. **Creating the Buyer Avatar**
   - Defined demographics, psychographics, motivations, and buying triggers.
   - Why: Gives clarity on *who* to target and *what* drives them.
2. **Researching Buyers**
   - Learned how to prepare with LinkedIn, reports, CRM (B2B) or social, reviews, and trends (B2C).
   - Why: Shows respect, builds credibility, and allows for meaningful first conversations.
3. **Sales Strategy Alignment**
   - Saw how different buyers prefer data, stories, convenience, or urgency.
   - Why: Flexing your approach builds trust faster and removes friction.

🚀 Next Steps for You (Student Action Plan)

- **Complete Your Buyer Avatar Worksheet** for one real or ideal customer.
- **Practice Fast Research:** Spend 3–5 minutes researching a lead before outreach this week.
- **Identify Buyer Types:** Reflect on 2–3 past customers — were they analytical, visionary, practical, relational, or urgency-driven? Write down what worked.
- **Prepare for Prospecting:** Bring your Buyer Avatar and notes into the next module, where we'll learn how to plant seeds through prospecting and pipeline growth.

📝 Trainer Closing Script

"Today we built the *roots of understanding* — clarity on who your buyers are, how to research them, and how to align your style to theirs. This is the foundation. In our next session, we'll move into **prospecting** — turning that understanding into daily action that fills your pipeline with the right opportunities."

Chapter 5.2: Module 2 - ENGAGE: Prospecting

Purpose of This Module

To equip participants with the skills, mindset, and tools to effectively identify, reach, and engage prospective buyers in a consistent and systematic way.

---

1. Trainer Script (Suggested Flow)

Opening (5 min)

- *Trainer says:*

  "Now that you've built clarity on who your buyer is, the next step is finding and reaching them. This is where many sales professionals struggle — not because prospects aren't out there, but because prospecting requires consistency, strategy, and confidence. Today, we'll break prospecting down into practical steps so you can keep your pipeline full."

- *Engagement question:*

  "When you hear the word *prospecting*, what comes to mind first? Excitement? Dread? Both?"

  - Allow for quick responses; reinforce that prospecting is a skill that can be learned and improved.

Trainer Script (for delivery)

Introduction

- *Trainer says:*

  "Before we start prospecting, let's get an honest look at where you are today. Prospecting isn't about talent, it's about habits and mindset. This quiz will help you see your current strengths and where you can grow."

Webinar version

- *Trainer says:*

  "This one's for you. Score yourself and keep it private. Use it as a mirror to reflect on your current approach."

Small group version

- *Trainer says:*

  "I'll collect these at the end of the session. This helps me understand the strengths and gaps in the room so we can tailor the discussion."

Pre-Training Diagnostic Quiz – Prospecting

Assessing Prospecting Mindset & Habits

Instructions

- Rate yourself honestly on each statement below using the scale:
  - **1 = Strongly Disagree**
  - **2 = Disagree**
  - **3 = Neutral / Sometimes**
  - **4 = Agree**
  - **5 = Strongly Agree**
- Total possible score: **50 points**

Part 1: Prospecting Mindset

1. I believe prospecting is a critical part of sales success.
2. I approach prospecting with confidence and consistency.
3. I don't take rejection personally; I see it as part of the process.

Part 2: Prospecting Habits

4. I maintain a regular daily or weekly prospecting routine.

5. I use multiple channels (calls, email, social, referrals) to find prospects.
6. I consistently add new contacts to my pipeline.

Part 3: Prospecting Skills

7. I can craft clear and relevant outreach messages that get responses.
8. I tailor my prospecting approach to the industry or role of the buyer.
9. I always include a clear next step (call-to-action) in my prospecting messages.

Part 4: Confidence Check

10. I feel confident that my current prospecting efforts will keep my pipeline full.

Scoring Rubric

🔎 **10–19 points: Struggling Stage**

- Prospecting feels inconsistent or overwhelming.
- Focus: building discipline and adopting proven routines.

🛠 **20–29 points: Building Stage**

- Some structure exists, but not yet consistent.
- Focus: diversifying channels and sharpening messages.

🚀 **30–39 points: Growing Stage**

- Solid habits with room to refine.
- Focus: improving quality of outreach and consistency in follow-up.

🌟 **40–50 points: Thriving Stage**

- Prospecting is a strength.
- Focus: optimization and teaching best practices to others.

Wrap-up

- *Trainer says:*

  "Find your score on the rubric. That's your starting point. No matter where you land, today you'll leave with strategies to move to the next stage."

Teaching Points (20 min)

Step 1: The Prospecting Mindset (7–8 min)

🎯 Big Picture (What & Why)

- **Definition:** The prospecting mindset is the *mental framework* that shapes how salespeople approach outreach. It's the balance of confidence, consistency, and resilience required to fill the pipeline.
- **Why it matters:**
  - Prospecting is where sales momentum begins.
  - A weak mindset leads to inconsistency, avoidance, or burnout.
  - A strong mindset fuels persistence, even when results aren't immediate.

🧭 Trainer Flow

0:00–0:45 | Open & Reframe
Trainer says:
"When you hear the word *prospecting,* what comes to mind first? Excitement? Dread? Both? The truth is — prospecting isn't glamorous, but it is the lifeblood of sales. Without it, the pipeline dries up. Today we're going to reframe prospecting: it's not about perfection, it's about *consistency and rhythm.*"

---

1) Consistency Over Perfection (2 min)

- **Definition:** Prospecting is about *showing up daily,* not "hitting a home run" with every call or email.
- **Why it matters:**

- One outreach doesn't make or break success.
- Consistency compounds — 5 touches a day = 1,200+ touches a year.
- Buyers remember patterns of reliability.

Trainer Line:
"Think of prospecting like going to the gym. Results don't come from one big workout — they come from steady reps over time."

B2B Notation: Steady touches build credibility in long cycles.
B2C Notation: Steady touches create visibility in a crowded, fast-moving market.

---

2) Resilience Against Rejection (2 min)

- **Definition:** Resilience is the ability to hear "no" (or nothing) and keep going without losing energy or confidence.
- **Why it matters:**
  - Rejection is data, not a personal failure.
  - A resilient rep treats "no" as "not yet."
  - Protects energy and avoids burnout.

Trainer Line:
"Your worth isn't tied to whether someone says yes today. Every no gets you closer to the right yes."

B2B Notation: Expect longer timelines and multiple no's before consensus.
B2C Notation: Expect higher volume of no's, but quicker pivots to the next lead.

---

3) Process vs. Outcome Focus (2 min)

- **Definition:** The mindset shift from obsessing over immediate results → focusing on controllable actions.
- **Why it matters:**
  - You can't control when a buyer says yes.
  - You *can* control daily activity, preparation, and tone.
  - Shifting focus reduces anxiety and increases consistency.

Trainer Line:
"Sales is a lagging indicator — today's activities fill tomorrow's pipeline. Control the inputs, and the outcomes will follow."

B2B Notation: Activities → opportunities → deals (longer lag).
B2C Notation: Activities → sales (shorter lag, but still requires consistent rhythm).

6:30–7:30 | Quick Engagement & Transition

- **Micro poll/question:**
  "How many of you would rate your prospecting mindset as a strength right now? Raise your hand or drop it in chat."
- **Trainer closes:**
  "No matter where you are, your mindset is a muscle. We're going to build it — starting with the first practical skill: building trust and rapport from the very first touch."

📝 Visual Aid (Slide Example)

Title: *The Prospecting Mindset = Consistency + Resilience + Process Focus*

- Left side: Icon of calendar (Consistency)
- Middle: Icon of shield (Resilience)
- Right side: Icon of gears (Process focus)
- Bottom: Tagline: *"Strong roots grow strong pipelines."*

Step 2: Building Trust & Rapport (8–10 min)

🎯 Big Picture (What & Why)

- **Definition:** Trust & rapport are the foundation of every sales relationship — starting at the *very first touchpoint.*
- **Why it matters:**
  - Buyers don't buy from people they don't trust.
  - Trust lowers resistance and accelerates conversations.
  - Rapport makes the buyer *want* to engage again.

🧭 Trainer Flow

0:00–0:45 | Open
Trainer says:
"Prospecting is more than activity. Every call, email, or message either builds trust or erodes it. From the very first touch, you're planting a seed of credibility. The question is: is it growing into trust…or doubt?"

---

1) Trust Builders (3 min)

Definition: Behaviors that show professionalism, care, and authenticity.

- Active listening — focus on them, not your pitch.
- Asking thoughtful, open-ended questions.
- Following through on promises (big or small).
- Being authentic — real conversation, not canned scripts.
- Empathy — showing you understand their challenges.
- Transparency — honest about pricing, timelines, limitations.
- Consistency — showing up prepared every time.
- Personalization — tailored, not cookie-cutter.

Trainer Tip: Share a quick personal example (e.g., how following up on a small promise built long-term trust).

---

2) Trust Killers (3 min)

Definition: Behaviors that make buyers defensive, skeptical, or disengaged.

- Talking more than listening.
- Overpromising & underdelivering.
- Dodging tough questions.
- Pushing your agenda instead of solving their problem.
- Using jargon to sound impressive.
- Ignoring buying signals.
- Focusing only on closing.
- Being late, unprepared, or inconsistent.

Trainer Activity Idea: Quick poll: *"Which of these trust killers have you seen in action lately? Which one do you catch yourself slipping into sometimes?"*

---

3) B2B vs. B2C Trust Dynamics (2 min)

- **B2B:**
  - Trust = professionalism, preparation, insight.
  - Show respect for time, bring relevant research, add value before asking for time.
  - Example: Referencing their company's recent announcement in outreach.
- **B2C:**
  - Trust = authenticity, relatability, social proof.

- Show consistency across channels, highlight testimonials or community reputation.
- Example: Sharing a story from another customer with a similar lifestyle stage.

7:30–9:00 | Transition Practice
Trainer says:
"Now, let's practice. Think of your Buyer Avatar from Module 1. Draft one sentence you could use in your first touch that builds trust. Keep it simple, personal, and real."

- Collect 2–3 responses (webinar: chat box; live session: share out loud).
- Give quick positive reinforcement: *"Notice how this feels different from a sales pitch? That's what opens doors."*

📝 Visual Aid (Slide or Infographic)

- **Left side (Green): Trust Builders** with icons (checkmarks, handshake, light bulb).
- **Right side (Red): Trust Killers** with icons (X mark, broken chain, warning sign).
- **Tagline across top:** *"Trust is the foundation of sales growth."*

Trust Builders vs. Trust Killers

🌟 Trust Builders

✓ Active listening — focus on the buyer, not your pitch
✓ Asking thoughtful, open-ended questions
✓ Following through on promises (big or small)
✓ Being authentic — no scripts, just real conversations
✓ Empathy — showing you understand their challenges
✓ Transparency — being clear about pricing, timelines, and limitations
✓ Consistency — showing up prepared and reliable every time
✓ Personalization — tailoring solutions, not cookie-cutter pitches

---

⚠️ Trust Killers

✗ Talking more than listening
✗ Overpromising and underdelivering
✗ Dodging tough questions
✗ Pushing your agenda instead of solving their problem
✗ Using jargon or technical terms to sound impressive
✗ Ignoring buying signals (or pushing when they aren't ready)
✗ Focusing only on closing instead of building a relationship
✗ Inconsistency — being late, unprepared, or unreliable

📌 Visual Concept for Infographic

- Split design: Left side = **Trust Builders** (green tones, icons like handshake, checkmarks, light bulb).
- Right side = **Trust Killers** (red tones, icons like broken chain, "X" marks, warning sign).
- Center/top = Your **CGN Logo** with tagline: *"Trust is the foundation of sales growth."*

Trainer Closing Script

"Trust and rapport are not soft skills — they are sales skills. When you open a conversation with trust, everything else gets easier. Next, we'll look at **where to find prospects** so you can put these trust-building skills into practice."

Step 3: Prospecting Sources (5–6 min)

🎯 Big Picture (What & Why)

- **Definition:** Prospecting sources are the channels and methods where new leads can be identified and engaged.
- **Why it matters:**
  - Diversifies your pipeline — you're not dependent on one channel.
  - Expands reach — different buyers live in different places.

- Increases consistency — if one source slows down, others keep producing.

🧭 Trainer Flow

0:00–0:45 | Open & Reframe
Trainer says:
"Prospecting isn't a one-lane road. If you only rely on one source — like referrals or cold calls — your pipeline becomes fragile. Healthy prospecting means *mixing your sources* so you're always planting new seeds in different soils."

---

1) Core Prospecting Sources (B2B vs. B2C)

B2B Sources (2 min)

- **Referrals & Introductions** – warmest, highest-converting leads.
- **Networking** – events, trade shows, professional associations.
- **LinkedIn & Social Selling** – profile research, thoughtful comments, InMails.
- **Inbound Leads** – marketing campaigns, content downloads, webinar sign-ups.
- **Cold Outreach** – well-crafted calls, emails, or DMs.

Trainer Example:
"A B2B rep might find a prospect by seeing they were just promoted on LinkedIn — that's a trigger event worth reaching out for."

B2C Sources (2 min)

- **Referrals & Word-of-Mouth** – friends, family, community.
- **Social Media** – Instagram, TikTok, Facebook groups.
- **Community Events** – local fairs, meetups, sponsorships.
- **Online Reviews & Forums** – Yelp, Reddit, niche groups.
- **Inbound/Walk-ins** – store traffic, website inquiries, social ads.

Trainer Example:
"A B2C rep might prospect by checking who engaged with last week's Instagram post — those are warm leads you can DM."

---

2) Interactive Activity: Source Mapping (2–3 min)