Fundamental Selling Skills

Coaching Reference Guide

The InteGREATion Toolkit is available online at:
www.acSELLerationseries.com/inteGREATion/index.cfm.

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Maher & Maher
Investment Advisors for Talent Development.
3535 Route 66, Bldg. 4 • Neptune, NJ 07753 • 732-918-8000 • www.mahernet.com

Purpose of the
AcSELLeration: Fundamental Selling Skills
Coaching Reference Guide

The *AcSELLeration: Fundamental Selling Skills Coaching Reference Guide* is designed to help you provide your Sales team with opportunities to apply and practice skills that are critical to all phases of the consultative sales process. Whether they are working independently to complete activity sheets or engaged in group discussions, the contents of this guide allow your team to reinforce new knowledge and skills, and improve various elements of their sales technique.

The *AcSELLeration: Fundamental Selling Skills Coaching Reference Guide* is intended to be used in tandem with the *AcSELLeration: Fundamental Selling Skills* web-based training (WBT) series, which consists of the following Introduction and seven modules:

- Introduction to Consultative Selling
- Establishing Rapport
- Interviewing
- Active Listening
- Matching and Presenting Products and Services
- Overcoming Objections
- Closing the Sale
- Setting Goals

Each module focuses on the skills sales professionals must develop to build the trust of customers, provide them with the right products and services for their needs, and successfully close their sales.

Maher & Maher
Investment Advisors for Talent Development.
3535 Route 66, Bldg. 4 • Neptune, NJ 07753 • 732-918-8000 • www.mahernet.com

While there is not a single, prescribed method of utilizing this guide, it is recommended that you dedicate two coaching sessions to each module in the series. The graphic below provides a suggested approach to covering each module and the supporting materials within the *AcSELLeration: Fundamental Selling Skills Coaching Guide*.

Session 1	Session 2
• Instruct your Sales team to complete the appropriate module in the *AcSELLeration: Fundamentals of Selling* WBT series. • Lead a discussion with your team regarding the content covered in the WBT. Sample questions to help spark discussion are provided in this guide. • Distribute all relevant job aids and activity sheets. • Instruct team members to complete activity sheets prior to the next session and to be prepared to discuss them.	• Review activity sheets as a group. • Lead a discussion with your team regarding their responses to the activity sheet. Sample questions to help spark discussion are provided in this guide. • Complete role play exercises (as applicable). • Engage your team in a discussion following the role-play exercise to highlight the use of consultative selling skills and opportunities for improvement. • Allow time for team members to ask any outstanding questions regarding the module. Address these questions appropriately.

Activities and Role Play Exercises

The activities and role play exercises within the *AcSELLeration: Fundamental Selling Skills Coaching Reference Guide* are designed to help spark discussions around critical consultative selling skills during coaching sessions. They are intended to help your team reflect on their existing selling skills and consider methods of improving them for better, more successful sales outcomes. They are also designed to help *you* identify the skills that are strongest among your team members and those that require careful coaching.

While the *AcSELLeration: Fundamentals of Selling Skills Coaching Reference Guide* provides suggestions for utilizing the activities and role play exercises in a coaching session with your Sales team, it is recommended that you leverage these activities and exercises for one-on-one coaching as well. You may also tailor activities and scenarios as needed to reflect your particular industry, or to emphasize specific products and/or services that your team is responsible for selling.

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Investment Advisors for Talent Development.
3535 Route 66, Bldg. 4 • Neptune, NJ 07753 • 732-918-8000 • www.mahernet.com

Introduction: Consultative Selling

In this Introduction, teams learn that consultative selling is the art of focusing on the wants and needs of the customer to sell a product or service, rather than focusing on the product or service itself. It is a method of guiding customers toward informed buying decisions based on careful investigation, effective communication, and recommendations that best fit their needs.

Session Agendas

To maximize learning and ensure time for the completion and discussion of all activities, it is recommended that you dedicate two coaching sessions to the Introduction: *Consultative Selling*. Proposed agendas for each session are as follows.

Session 1 Agenda

Complete the WBT

Instruct your Sales team to complete the *AcSELLeration: Fundamentals of Selling Skills* WBT Introduction titled, *Consultative Selling*.

Group Discussion

Engage your team in a brief group discussion regarding the WBT. Ask questions to gauge your team's understanding of the content that was covered, and allow your team to present any questions they might have.

Sample questions that you might present during this time include, but are not limited to, the following:

- *The WBT discussed the six steps of the consultative sales process. Which step do you have the most success with? Which step do you struggle with?*
- *Do you feel that you currently use the consultative selling skills that were defined in the WBT? Which of these skills do you need to improve?*
- *The WBT suggested that using consultative sales skills can help reduce your stress levels at work. Why do you think this is true?*

Distribute Relevant Job Aids

Distribute the job aid titled, *Consultative Selling at a Glance*.

Distribute Activity Sheets

Distribute the activity sheet titled, *Consultative Selling Skills*.

Instruct your Sales team to complete this activity sheet prior to the next coaching session. They will share their responses with the group when you reconvene.

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Investment Advisors for Talent Development.
3535 Route 66, Bldg. 4 • Neptune, NJ 07753 • 732-918-8000 • www.mahernet.com

Session 2 Agenda

Review Activity Sheets

Ask each member of your Sales team to share their responses to the questions on the *Consultative Selling Skills* activity sheet.

Lead a group discussion regarding the responses team members provided to each question. Sample questions that you might present during this time include, but are not limited to, the following:

- *What common threads did you identify in each team member's response regarding traits and characteristics of sales professionals that are most appealing?*
- *What similarities did you identify between the positive experiences team members have had with sales professionals? What similarities did you identify between the negative experiences?*
- *Think about a consultative selling skill you identified as being in need of improvement. Did one of your teammates identify this as one of their strongest skills? How might team members learn from each other?*

Complete Role Play Exercise

Select two volunteers to participate in the role play exercise with you.

Distribute two copies of the *Consultative Selling Role Play Checklist* to the remaining team members. Instruct them to complete one checklist for each role play scenario.

When the role play exercise is complete, engage your team in a brief discussion. Ask team members to share the ratings and comments they recorded on their checklist, and ask them to discuss their observations regarding strengths and weaknesses in each scenario.

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Activity Sheet: Consultative Selling Skills

The following activity allows you to identify the consultative selling skills that are most important to you, and it asks you to consider how *you* apply these skills as a sales professional. Complete this activity prior to your next coaching session and be prepared to share your responses with the team.

1. What traits and characteristics do you find most appealing in a sales professional when you are the customer? Why are they important to you? Do you demonstrate these traits and characteristics when interacting with customers?

2. Think about an experience you have had with a sales professional that was remarkably positive. Why does this sales experience stand out above others?

3. Think about an experience you have had with a sales professional that was unpleasant. Why did you feel dissatisfied with this experience? What could the sales professional have done differently to improve the experience?

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Investment Advisors for Talent Development.
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4. Take a moment to reflect on the characteristics of successful consultative sales professionals that were discussed in the WBT. Which of these characteristics do you strongly possess? Which of these characteristics might you improve? What steps might you take to improve these characteristics?

5. What advice would you offer someone who is beginning a new role as a consultative sales professional? What suggestions would you make for communicating effectively with customers and guiding them toward the product or service that is right for their needs?

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3535 Route 66, Bldg. 4 • Neptune, NJ 07753 • 732-918-8000 • www.mahernet.com

Role Play Exercise: Which Sales Professional Would You Prefer?

Directions

1. Select two volunteers from your coaching session to participate in the following role play scenarios. One volunteer will participate in Scenario #1 and the other will participate in Scenario #2.
2. In each scenario, you will assume the role of the sales professional and your volunteers will assume the roles of the customers.
3. Distribute two copies of the *Consultative Selling Role Play Checklist* that appears on the next page to each participant in the coaching session. Instruct them to observe the role plays carefully and complete a role play checklist for each scenario.
4. When you have completed the scenarios:
   - Ask volunteers to share their observations and discuss the differences between the selling skills displayed in each scenario.
   - Ask volunteers to identify whether they would be more likely to do business with the Sales Professional in Scenario #1 or Scenario #2. Ask them to explain their answer.

Scenario #1

Sheila Young has called her mobile service provider for assistance. She is returning to work after maternity leave and her mother has offered to care for her baby while she is in the office. Her mother has a cell phone, but it is outdated and difficult to use for texting. She would like to upgrade her mother's phone, and purchase a plan that allows unlimited calls and texting. Since her mother stays in touch with family and friends via social media, she would also like to purchase a data plan.

The Sales Consultant Mrs. Young speaks with is not very helpful. He does not listen carefully to her specific requests, and he seems quite focused on selling her a mobile device that is expensive and exceeds her mother's needs. When Mrs. Young tries to clearly describe her mother's technical capabilities and the ways in which the phone will most often be used, the Sales Consultant interrupts her, implies that she is underestimating her mother's technical savvy, and pushes a very elaborate phone and service plan.

Scenario #2

Sheila Young has called her mobile service provider for assistance. She is returning to work after maternity leave and her mother has offered to care for her baby while she is in the office. It's been quite a while since Mrs. Young has upgraded her mobile device and service plan, and she is unsure of her options.

The Sales Consultant Mrs. Young speaks with is happy to help and wants to identify the best phone and plan for her mother's needs. He asks many questions to determine how Mrs. Young's mother will use the phone and how comfortable she might be with various mobile devices. He listens carefully to each response and makes recommendations for a device and service plan that are most appropriate. He also notices that it's been a while since Mrs. Young has upgraded her service plan, and he thinks he

Maher & Maher
Investment Advisors for Talent Development.
3535 Route 66, Bldg. 4 • Neptune, NJ 07753 • 732-918-8000 • www.mahernet.com

has some options that that will boost her service while saving her money. He presents these options to her, as well.

Consultative Selling Role Play Checklist

Carefully observe the role play exercise. Then, use the table below to indicate whether your coach applied effective consultative selling skills throughout the scenario. Use a (+) if the skill was used very effectively; a (✓) if the skill was used, but needs improvement; or a (-) if the skill was used poorly or not at all. Use the Comments column to record specific notes regarding the Sales Consultant's use of each skill.

Skill	Rating	Comments
The sales professional asked questions and listened carefully to the customer's responses to determine his or her wants, needs, preferences, and priorities.		
The sales professional recommended appropriate solutions for the customer's wants, needs, preferences, and priorities.		
The sales professional spoke clearly and refrained from interrupting the customer.		
The sales professional used the customer's name during the conversation.		
The sales professional remained polite and professional throughout the dialogue.		
The sales professional represented the company in a positive manner.		

Additional Comments and Observations:

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3535 Route 66, Bldg. 4 • Neptune, NJ 07753 • 732-918-8000 • www.mahernet.com

Module 1: Establishing Rapport

In this module, your team will learn that establishing rapport and earning the trust of their customers are critical first steps in the consultative sales process. They will discover that, unless there is an element of comfort and communication between the Sales Consultant and the customer, the customer may be reluctant to voice their needs, preferences, and concerns. Without a willingness to share this information, Sales Consultants cannot match products and services that are most suitable for the customer, and the sale cannot be closed.

Session Agendas

To maximize learning and ensure time for the completion and discussion of all activities, it is recommended that you dedicate two coaching sessions to the *Establishing Rapport* module. Proposed agendas for each session are as follows.

Session 1 Agenda

Complete the WBT — Instruct your Sales team to complete the *AcSELLeration: Fundamentals of Selling Skills* WBT module titled, *Establishing Rapport*.

Group Discussion — Engage your team in a brief group discussion regarding the WBT. Ask questions to gauge their understanding of the content that was covered, and allow your team to present any questions they might have.

Sample questions that you might present during this time include, but are not limited to, the following:

- *What actions do you currently take to establish rapport with your customers? Do you find success with these actions?*
- *Did the WBT help you identify actions you take that might currently inhibit your ability to establish rapport with customers? What are those actions? How can you improve them?*
- *The WBT suggested that honing your ability to establish rapport with customers is paramount to your ability to successfully close your sales. Do you agree with this statement? Why or why not?*

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- *The WBT provided examples of forbidden terms and phrases that you should never use when talking with a customer. Do you ever use any of these terms or phrases? How will you remind yourself to refrain from using them in the future?*

Distribute Relevant Job Aids

Distribute the job aids titled, *Key Behaviors for Developing Rapport* and *Supporting Statements and Forbidden Statements*.

Distribute Activity Sheets

Distribute the activity sheet titled, *How Well Do You Establish Rapport with Customers?*

Instruct your Sales team to complete this activity sheet prior to the next coaching session. They will share their responses with the group when you reconvene.

Session 2 Agenda

Review Activity Sheets

Ask each member of your Sales team to share their responses to the questions on the *How Well Do You Establish Rapport with Customers?* activity sheet.

Lead a group discussion regarding the responses team members provided to each question. Sample questions that you might present during this time include, but are not limited to, the following:

- *Can you identify some common threads between the behaviors that team members identified as needing improvement? Do you think these behaviors are difficult to develop and/or maintain? Why or why not?*
- *The last question on the worksheet asked you to think about how you might express empathy to and build trust with a customer who has recently had unpleasant experiences with your company. Do you think any of the responses you heard from other team members will help you improve your own ability to show empathy? How so?*
- *Based on your responses to the questions on this activity sheet and the responses provided by your teammates, what advice would you give a new consultative sales professional who is learning how to establish rapport with a customer? What advice would have been helpful for you when you were first hired?*

Complete Role Play Exercise

Select a volunteer to participate in the role play exercise with you.

Distribute the *Establishing Rapport Role Play Checklist* to the remaining team members. Ask them to complete the checklist following each role play scenario.

When the role play exercise is complete, engage your team in a brief discussion. Ask team members to share the ratings and comments they

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recorded on their checklist, and ask them to discuss their observations regarding strengths and weaknesses.

Activity Sheet: How Well Do You Establish Rapport with Customers?

The following activity allows you to consider how well you use the skills and behaviors that are necessary to building rapport with customers. Complete this activity prior to your next coaching session and be prepared to share your responses with the team.

1. The WBT identified key behaviors that will help you establish rapport with your customers. Do you think you currently use all of the behaviors that were discussed? Which behavior(s) might you improve? What actions will you take to improve them?

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2. Do you ever receive feedback from customers that indicates that they are pleased with your ability to establish rapport with them? What are some examples of things customers have said to indicate that they were pleased with their conversation with you?

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3. Can you think of a recent, specific time when you could not successfully establish rapport with a customer? Why was it difficult to establish rapport with the customer? How did he or she respond to you throughout the conversation? What could you have done differently to make the call more successful?

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4. The WBT stressed the importance of knowing and understanding all aspects of your company's products, services, and policies so that you can provide customers with accurate information on demand. Can you recall a time when a customer asked questions that you could not answer? How did this impact the rest of your conversation with the customer? What steps did you take to ensure you could answer those questions the next time they were presented to you?

5. Let's suppose you are speaking with a customer who voices many reservations about continuing his business with your company. He states that he has had some unpleasant experiences with your billing and customer service departments in the recent past. What might you say to express empathy in this situation? How can you establish trust with the customer, and assure him that you want to help resolve these issues and find a solution that is right for his needs?

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Role Play Exercise

Directions

1. Select a volunteer from your coaching session to participate in the following role play scenario. The volunteer will assume the role of the sales professional and you will assume the role of the customer.
2. Distribute one copy of the *Establishing Rapport Role Play Checklist* that appears on the next page to each participant in the coaching session. Instruct participants to observe the role play carefully and complete the checklist appropriately.
3. When you have completed the role play, ask participants to share their observations about the volunteer's ability to establish rapport with you. Share your own feedback and observations during this time, as well.

Scenario

James Saunders is a small business owner who receives his bottled water from a local company called Clearview Springs. Lately, he has noticed that his orders are not arriving as scheduled. He has also had some issues with billing errors in the past. He has done business with this company for many years and he is disappointed with the recent service gaps he has experienced.

A sales consultant from Clearview Springs has reached out to Mr. Saunders to inform him that the company now offers coffee supplies in addition to bottled water. Mr. Saunders shares his hesitation with ordering any additional products from Clearview Springs and admits that he is considering ordering his bottled water from a competitor.

The sales consultant must focus on the following objectives during the call:

- Convey empathy to Mr. Saunders for his recent frustrations with the company.
- Build trust in the customer that Clearview Springs will remedy the delivery and billing issues he has recently experienced.
- Encourage Mr. Saunders to stay on the line and discuss his need for coffee supply services.

Establishing Rapport Role Play Checklist

Carefully observe the role play exercise. Then, use the table below to indicate whether the Sales Consultant effectively established rapport with the customer in this scenario. Use a (+) if the skill was used very effectively; a (✓) if the skill was used, but needs improvement; or a (-) if the skill was used poorly or not at all. Use the Comments column to record specific notes regarding the Sales Consultant's use of each skill.

Skill	Rating	Comments
The sales professional greeted the customer professionally.		
The sales professional demonstrated courtesy throughout the call.		
The sales professional used the customer's name throughout the call.		
The sales professional used supporting statements.		
The sales professional avoided forbidden phrases.		
The sales professional responded with empathy to any negative comments.		
The sales professional provided accurate information.		
The sales professional smiled and demonstrated a positive attitude.		

Additional Comments and Observations:

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Module 2: Interviewing

In this module, your team will learn that effective interviewing skills enable Sales Consultants to ask key questions that compel customers to speak freely about preferences, wants, and needs. Once they have uncovered this information, the Sales Consultants can tailor their recommendations for products and services that are the best fit for the customer. By focusing on the customer's specific needs and presenting products and services appropriately, Sales Consultants are more likely to close sales at a higher volume.

Session Agendas

To maximize learning and ensure time for the completion and discussion of all activities, it is recommended that you dedicate two coaching sessions to the *Interviewing* module. Proposed agendas for each session are as follows.

Session 1 Agenda

Complete the WBT	Instruct your Sales team to complete the *AcSELLeration: Fundamentals of Selling Skills* WBT module titled, *Interviewing*.
Group Discussion	Engage your team in a brief group discussion regarding the WBT. Ask questions to gauge their understanding of the content that was covered, and allow your team to present any questions they might have. Sample questions that you might present during this time include, but are not limited to, the following: ▪ *The WBT discussed making blind offers to customers based on a current sales promotion without interviewing the customer first to identify his or her needs. Have you ever done this as a Sales Consultant? Was it an effective approach? Why or why not?* ▪ *How could making assumptions about customer needs and preferences interfere with your ability to successfully close a sale? Why do you think careful interviewing and probing help lessen the risk of losing a sale?* ▪ *Can you think of any interview skills that you would like to improve? What are they? What steps can you take to improve these skills?*
Distribute Relevant Job Aid	Distribute the job aid titled, *Open Probes vs. Closed Probes*.
Distribute Activity Sheets	Distribute the activity sheet titled, *Effective Interviewing*.

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Instruct your Sales team to complete this activity sheet prior to the next coaching session. They will share their responses with the group when you reconvene.

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Session 2 Agenda

Review Activity Sheets

Ask each member of your Sales team to share their responses to the questions on the *Effective Interviewing* activity sheet.

Lead a group discussion regarding the responses team members provided to each question. Sample questions that you might present during this time include, but are not limited to, the following:

- *What similarities did you identify between the team's experiences with sales professionals who pushed products without first listening to their needs and preferences? Overall, were these experiences positive or unfavorable?*
- *What similarities did you identify between the team's experiences with sales professionals who were careful to uncover their needs and preferences?*
- *As a sales professional, do you feel you use interviewing skills that make your customers feel heard and understood? How might you improve these skills?*
- *Did hearing examples of the open and closed probes that other team members use to identify their customer needs help you think of ways in which you might improve your own probing technique? How so?*

Complete Role Play Exercise

Select a volunteer to participate in the role play exercise with you.

Distribute the *Interviewing Role Play Checklist* to the remaining team members. Ask them to complete the checklist following each role play scenario.

When the role play exercise is complete, engage your team in a brief discussion. Ask team members to share the ratings and comments they recorded on their checklist, and ask them to discuss their observations regarding strengths and weaknesses.

Activity Sheet: Effective Interviewing

The following activity allows you to consider how well you use interviewing skills to discover the wants, needs, preferences, and concerns of customers. Complete this activity prior to your next coaching session and be prepared to share your responses with the team.

1. As a sales professional, do you find it hard to refrain from making assumptions about a customer's wants and needs? When you sense that you are beginning to make assumptions, how do you refocus on the interview process and ask the right questions to truly uncover their needs?

2. As a consumer, are you likely to buy a product or service from a sales professional who does not ask questions and make a strong effort to understand your needs, preferences, and concerns? Why or why not?

3. Can you think of a specific scenario when a sales professional tried to push a new product or service without talking with you first and determining whether the offer was a good fit for your needs? How did you respond? Are you likely to buy a product or service under these circumstances?

4. Can you think of a specific scenario when a sales professional made a concerted effort to discover your wants and needs, and find a solution that was truly appropriate for you? Did you purchase the service or product the sales professional suggested? Why or why not?

5. In the space provided below, list three to five open probes that you typically use to open up dialogue with your customers. Based on what you learned in the WBT, can you think of improvements you might make to these questions?

6. Choose one of the open probes you identified in Question 1, and write two to three closed probes you might ask to narrow down the customer's needs and focus your dialogue appropriately. Based on what you learned in the WBT, can you think of improvements you might make to these questions?

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3535 Route 66, Bldg. 4 • Neptune, NJ 07753 • 732-918-8000 • www.mahernet.com

Role Play Exercise

Directions

1. Select a volunteer from your coaching session to participate in the following role play scenario. The volunteer will assume the role of the sales professional and you will assume the role of the customer.
2. Distribute one copy of the *Interviewing Role Play Checklist* that appears on the next page to each participant in the coaching session. Instruct participants to observe the role play carefully and complete the checklist appropriately.
3. When you have completed the role play, ask participants to share their observations regarding the volunteer's interviewing skills. Share your own feedback and observations during this time, as well.

Scenario

Michael Leonard is the father of a toddler and is expecting twins in eight weeks. He would like to trade his sedan in for something that can accommodate two infant car seats and a toddler seat, and offers plenty of room for a double stroller, portable crib, and other gear. Since he will use the new vehicle daily to commute to work and for road trips with his family throughout the year, he wants something that offers the best gas mileage possible. Safety features are also a critical factor and will guide his buying decision. He is visiting a car dealer to take a look at a few different models of SUVs for his growing family.

Janice Walker, a sales consultant from the car dealership, approaches Mr. Leonard on the lot. Since Mr. Leonard is alone, the consultant is not immediately aware of his family needs and space requirements. She would like to assist him and answer any questions he might have regarding the vehicles on the lot, but she will need to do some careful interviewing to determine his needs, preferences, and budget before she can point him toward the best options. The sales consultant must use strong interviewing skills to uncover the information she needs to properly assist Mr. Leonard.

Maher & Maher
Investment Advisors for Talent Development.
3535 Route 66, Bldg. 4 • Neptune, NJ 07753 • 732-918-8000 • www.mahernet.com

Interviewing Role Play Checklist

Carefully observe the role play exercise. Then, use the table below to indicate whether the Sales Consultant applied effective interviewing skills throughout the scenario. Use a (+) if the skill was used very effectively; a (✓) if the skill was used, but needs improvement; or a (-) if the skill was used poorly or not at all. Use the Comments column to record specific notes regarding the Sales Consultant's use of each skill.

Skill	Rating	Comments
These sales professional asked an appropriate number of open probes to help open dialogue with the customer.		
The sales professional asked closed probes that helped focus on the customer's specific wants, needs, and preferences.		
The sales professional asked an appropriate combination of open and closed probes.		
The sales professional did not make assumptions regarding the customer's wants, needs, and preferences.		
The sales professional used strong active listening skills.		
The sales professional did not interrupt the customer while he or she provided information regarding his wants, needs, preferences, or concerns.		
The sales professional did not push a product that did not reflect the customer's wants, needs, and preferences.		

Additional Comments and Observations:

Maher & Maher
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3535 Route 66, Bldg. 4 • Neptune, NJ 07753 • 732-918-8000 • www.mahernet.com

Module 3: Active Listening

In this module, participants learn that active listening skills are critical to effectively assisting their customers, and pairing them with the most appropriate products and services for their needs. They discover key tips for improving their active listening skills, and identify methods of removing or reducing barriers that interfere with their ability to listen closely to conversations with customers.

Session Agendas

To maximize learning and ensure time for the completion and discussion of all activities, it is recommended that you dedicate two coaching sessions to the *Active Listening* module. Proposed agendas for each session are as follows.

Session 1 Agenda

Complete the WBT

Instruct your Sales team to complete the *AcSELLeration: Fundamentals of Selling Skills* WBT module titled, *Active Listening*.

Group Discussion

Engage your team in a brief group discussion regarding the WBT. Ask questions to gauge their understanding of the content that was covered, and allow your team to present any questions they might have.

Sample questions that you might present during this time include, but are not limited to, the following:

- *What behaviors indicate that a sales professional is listening to you? What behaviors indicate that a sales professional is* ***not*** *listening as well as he or she should? Are you mindful of these behaviors when you engage in conversations with your customers?*
- *Based on the information covered in the WBT, how would you rate your ability to actively listen to customers? Would you say your active listening skills are strong, or could they use some improvement? How might you improve them?*
- *What measures do you currently take to ensure you are listening as carefully as possible to your customers? What measures do you take to reduce distractions during conversations with customers?*

Distribute Relevant Job Aid

Distribute the job aid titled, *Improving Active Listening Skills*.

Distribute Activity Sheets

Distribute the activity sheet titled, *Improving Your Active Listening Skills*.

Instruct your Sales team to complete this activity sheet prior to the next coaching session. They will share their responses with the group when you reconvene.

Maher & Maher
Investment Advisors for Talent Development.
3535 Route 66, Bldg. 4 • Neptune, NJ 07753 • 732-918-8000 • www.mahernet.com

Session 2 Agenda

Review Activity Sheets

Ask each member of your Sales team to share their responses to the questions on the *Improving Your Active Listening Skills* activity sheet.

Lead a group discussion regarding the responses team members provided to each question. Sample questions that you might present during this time include, but are not limited to, the following:

- *The activity asked you to consider the active listening skills you use in your personal life. How do your listening skills as a Sales Consultant reflect the listening skills you use in your personal life? Would you say they are better or could use improvement? Explain your answer.*
- *What similarities did you notice between the active listening barriers that you and your teammates experience?*
- *What changes should you make to your listening habits to improve your active listening skills? What changes to your work environment would improve your active listening skills?*

Complete Active Listening Exercise

Instruct the participants in your training session to form pairs and complete the *Active Listening Exercise: What's for Dinner?*

When the exercise is complete, distribute the *Active Listening Exercise Checklist* to each pair and engage your team in a brief discussion. Ask team members to share the ratings and comments they recorded on their checklist, and ask them to discuss their observations regarding strengths and weaknesses.

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Activity Sheet: Improving Your Active Listening Skills

The following activity allows you to consider how well you use interviewing skills to discover the wants, needs, preferences, and concerns of customers. Complete this activity prior to your next coaching session and be prepared to share your responses with the team.

1. Do you think you have strong listening skills in your personal life? Why or why not?

2. The WBT states that Sales Consultants must be able to paraphrase the responses customers provide to their questions. Why do you think the ability to paraphrase a customer's response is an important part of active listening? Do you currently do this with your customers?

3. The WBT states that a Sales Consultant's ability to remain unbiased and unemotional when talking with customers is critical to building strong active listening skills. Do you find this challenging? Why or why not?

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4. The WBT discussed three barriers that interfere with our ability to carefully listen to customers: time, environment, and assumptions. Do you struggle with any of these barriers to active listening? Have you taken any measures to reduce or remove these barriers? If so, were your efforts successful?

5. Can you think of ways in which your Supervisor might help you remove or reduce any barriers that currently interfere with your active listening skills? Provide some examples.

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Active Listening Exercise: What's for Dinner?

In this activity, participants form pairs to complete an activity that requires the use of strong active listening skills. One participant in each pair will be the **Speaker** and the other will be the **Listener**. Follow the directions below to complete the exercise.

Directions

1. Instruct participants to form pairs. One participant in each pair will be the Speaker and the other participant will be the Listener.
2. The Speaker in each pair should think of a meal that he or she enjoys making for dinner. The Speaker should then share the following with the Listener:
   - The ingredients that are required to prepare the meal
   - How to prepare and cook the ingredients
   - The amount of time required to cook the meal
   - The number of people the recipe feeds
3. The Listener should pay close attention to the details of the recipe. He or she should use the active listening skills that were discussed in the WBT and take notes as needed.
4. Allow five minutes for pairs to complete this exercise.
5. When pairs have finished this exercise, instruct the Listener in each pair to relay the details of the recipe to the rest of the class.
6. Distribute one copy of the *Active Listening Exercise Checklist* that appears on the next page to the Speaker in each pair. Tell Speakers to complete the checklist based on their partner's listening skills and ability to accurately share the recipe with the rest of the class. When Speakers have completed their checklists, they will share their responses with the rest of the class.
7. Discuss the strengths and opportunities for improvement that were demonstrated during this exercise. Provide coaching tips and advice that your Sales team may use to improve their active listening skills as needed.

Active Listening Exercise Checklist

Use the table below to indicate whether your partner applied effective active listening skills throughout the Active Listening Exercise. Use a (+) if the skill was used very effectively; a (✓) if the skill was used, but needs improvement; or a (-) if the skill was used poorly or not at all. Use the Comments column to record any additional notes that you would like to share with your partner.

Skill	Rating	Comments
Your partner was not distracted during the Active Listening Exercise.		
Your partner recorded only the key points of your discussion. He or she did not write down every word that you said.		
Your partner remained unbiased and unemotional throughout the exercise. Your partner listened carefully, even if the recipe did not appeal to him or her.		
Your partner did not interrupt you while you spoke.		
Your partner did not get discouraged if you said something that he or she did not understand.		
Your partner asked clarifying questions as needed.		
Your partner paraphrased details of the conversation as needed to ensure understanding.		
Your partner successfully relayed the recipe to the rest of the class.		

Additional Comments and Observations:

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Module 4: Matching and Presenting Products and Services

In this module, participants learn that their ability to match and present products that meet the needs, wants, and preferences of their customers is vital to their ability to successfully close sales. They also recognize the importance of strong product knowledge in conveying how the features of a product or service satisfy the specific needs of customers.

Session Agendas

To maximize learning and ensure time for the completion and discussion of all activities, it is recommended that you dedicate two coaching sessions to the *Matching and Presenting Products and Services* module. Proposed agendas for each session are as follows.

Session 1 Agenda

Complete the WBT

Instruct your Sales team to complete the *AcSELLeration: Fundamentals of Selling Skills* WBT module titled *Matching and Presenting Products and Services*.

Group Discussion

Engage your team in a brief group discussion regarding the WBT. Ask questions to gauge their understanding of the content that was covered, and allow your team to present any questions they might have.

Sample questions that you might present during this time include, but are not limited to, the following:

- *The WBT states that your knowledge of the products and/or services your company offers will improve your ability to close sales more frequently. Why do you think this is true?*
- *In what way do you think a strong knowledge of the products and services your competitors offer might improve your ability to close sales?*
- *Under what circumstances do you feel it is appropriate to discuss products and services offered by competitors?*
- *How might you help a colleague who recently joined your Sales teams become acquainted with the features and unique selling points of the products and/or services you sell? What advice would you offer to help your colleague improve his or her product knowledge?*

Distribute Relevant Job Aid

Distribute the job aid titled, *Three Steps for Matching and Presenting Products*.

Distribute Activity Sheets

Distribute the activity sheet titled, *How Well Do You Match Products and Services to Customer Needs?*

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Instruct your Sales team to complete this activity sheet prior to the next coaching session. They will share their responses with the group when you reconvene.

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Session 2 Agenda

Review Activity Sheets

Ask each member of your Sales team to share their responses to the questions on the *Matching and Presenting Products and Services* activity sheet.

Lead a group discussion regarding the responses team members provided to each question. Sample questions that you might present during this time include, but are not limited to, the following:

- *Were you surprised to hear that the participants in this training feel as though they have (or don't have) a strong knowledge of the features and USPs of the products they sell? Why or why not?*
- *If your knowledge of certain products and services that you sell is broader than others, what steps can you take to ensure a more balanced understanding of your company's offerings?*
- *Did hearing your classmates' ideas regarding how they might improve their product knowledge provide you with ideas about how you might improve* ***your*** *product knowledge? If so, how?*

Complete Matching and Presenting Exercise

Tell participants that, in this exercise, volunteers will use features and unique selling points to demonstrate why a restaurant, vacation destination, car, book, or other item is a good choice for you. Volunteers will ask discovery questions, use active listening skills, and refer to the material that was covered in the WBT to uncover your preferences and make suggestions appropriately.

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Activity Sheet: How Well Do You Match Products and Services to Customer Needs?

The following activity allows you to consider your ability to successfully match the features and unique selling points of products and services to the specific needs of your customers. Complete this activity prior to your next coaching session and be prepared to share your responses with the team.

1. Do you feel as though you have a strong knowledge of the features and unique selling points of the products and/or services your company offers? Are you able to discuss these features and USPs in detail during most interactions with customers? Explain.

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2. Is your knowledge of certain products/services that you sell broader than your knowledge of others? How so?

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3. Do you feel as though the strength of your product knowledge has helped your ability to successfully close sales? Has it ever hindered your ability to close a sale? Explain.

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4. What steps might you take to improve your knowledge of the products and/or services you sell?

5. Are you familiar with the products and services offered by competitors? Do you leverage this knowledge during interactions with customers? If so, how?

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Matching and Presenting Exercise: What Do You Suggest?

In this activity, you will ask volunteers in your training session to use features and unique selling points to demonstrate why a restaurant, vacation destination, car, book, or other item is a good choice for you. Volunteers should ask discovery questions and use active listening skills to uncover your preferences and make suggestions appropriately.

Directions

1. Go around the room and ask volunteers to recommend one of the following to you:
   - Vacation destination
   - US city
   - Restaurant
   - Car make and/or model
   - Television program
   - Movie
   - Book
   - Sport/outdoor activity
   - Breakfast item
   - Board game
2. Tell participants that they should ask you discovery questions, use active listening skills, and refer to the material they learned in the *Matching and Presenting Products and Services* WBT to uncover your needs and preferences before making a suggestion.
3. Once participants have uncovered your needs and preferences, they should make a suggestion using features and USPs to demonstrate why it is a good fit for you.
4. Tell participants whether their suggestion sounds like a good fit for you. Explain why or why not. Identify the probing and active listening skills that participants used well, and provide guidance regarding how they might have improved these skills and presented a better suggestion for you.
5. When you the activity is complete, debrief by leading a class discussion regarding the importance of the following:
   - Asking key discovery questions to uncover needs and preferences.
   - Using active listening skills to ensure an understanding of the customer's responses.
   - Using features and USPs to demonstrate how a product or service is a strong match for the customer's wants and needs.

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Module 5: Overcoming Objections

In this module, participants learn how to overcome customer objections in order to successfully close their sales.

Session Agendas

To maximize learning and ensure time for the completion and discussion of all activities, it is recommended that you dedicate two coaching sessions to the *Overcoming Objections* module. Proposed agendas for each session are as follows.

Session 1 Agenda

Complete the WBT

Instruct your Sales team to complete the *AcSELLeration: Fundamentals of Selling Skills* WBT module titled, *Overcoming Objections*.

Group Discussion

Engage your team in a brief group discussion regarding the WBT. Ask questions to gauge their understanding of the content that was covered, and allow your team to present any questions they might have.

Sample questions that you might present during this time include, but are not limited to, the following:

- *The WBT training discussed a six-step process for overcoming customer objections. Do you think applying this process will help your ability to overcome objections and close more sales?*
- *Do you currently use the offsetting process that was discussed in the WBT? How do you think offsetting will help improve your ability to overcome objections?*

Distribute Relevant Job Aid

Distribute the job aid titled, *Six Steps to Overcoming Objections*.

Distribute Activity Sheets

Distribute the activity sheet titled, *Improving Your Ability to Overcome Objections*.

Instruct your Sales team to complete this activity sheet prior to the next coaching session. They will share their responses with the group when you reconvene.

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Session 2 Agenda

Review Activity Sheets	Ask each member of your Sales team to share their responses to the questions on the *Improving Your Ability to Overcome Objections* activity sheet. Lead a group discussion regarding the responses team members provided to each question. Sample questions that you might present during this time include, but are not limited to, the following: ▪ *What similarities did you notice among the customer objections your teammates typically hear?* ▪ *Did hearing the methods your teammates use to overcome these objections provide ideas for improving your own methods? If so, how?*
Complete Overcoming Objections Exercise	In this classroom exercise, you will present common objections to each participant and ask them to provide a response. Provide feedback for each response and tips for improvement as needed.

Activity Sheet: Improving Your Ability to Overcome Objections

The following activity allows you to consider your ability to successfully overcome customer objections. Complete this activity prior to your next coaching session and be prepared to share your responses with the team.

1. List three objections that you commonly hear as a Sales Consultant.

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2. Choose one of the objections that you identified in Question #1. How do you typically respond to this objection? Feel free to identify more than one response.

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3. Based on what you learned in the WBT, how can you improve your approach toward overcoming this objection you discussed in Question #2?

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4. The WBT states that Sales Consultants should follow a six-step process to overcome customer objections: 1) Actively Listen, 2) Acknowledge, 3) Probe, 4) Clarify and Restate, 5) Gain Commitment, and 6) Close Again. Do you follow this process to overcome objections? If not, what process do you follow?

5. What part of overcoming customer objections do you struggle with most? Based on what you learned in the WBT, how might you improve this?

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Overcoming Objections Exercise: I Object!

In this activity, you will present common customer objections to each participant in your training session. Participants should provide a response to overcome your objection.

Directions

1. Go around the room and present one of the following common customer objections to each participant in your training session.
   - "The cost of your product or service is too high."
   - "I can't afford your product or service right now."
   - "Your competitors offer this product or service at a much lower price."
   - "I don't have time to talk with you right now."
   - "I don't need your product or service at this time."
   - "I already receive this product or service from a competitor."
   - "I have had poor experiences with your company in the past."
   - "I have read terrible reviews of your product or service."
2. Instruct participants to use the skills they learned in the WBT to overcome the objection.
3. Identify strong statements and provide tips for improvement as needed.
4. When every participant has had an opportunity to overcome an objection, lead a discussion regarding participants' ability to do the following:
   - Express empathy for the customer's concerns.
   - Acknowledge the customer's concerns without agreeing with them.
   - Probe as needed to drill deeper into the objection.
   - Highlight the features and benefits of the product/service to overcome the objection.
   - Confirm that the objection had been overcome.

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Module 6: Closing the Sale

In this module, participants learn how to apply the closing technique that best fits the customer's level of interest and buying signs. They realize that their choice of closing technique greatly influences their ability to successfully close their sales.

Session Agendas

To maximize learning and ensure time for the completion and discussion of all activities, it is recommended that you dedicate two coaching sessions to the *Closing the Sale* module. Proposed agendas for each session are as follows.

Session 1 Agenda

Complete the WBT

Instruct your Sales team to complete the *AcSELLeration: Fundamentals of Selling Skills* WBT module titled, *Closing the Sale*.

Group Discussion

Engage your team in a brief group discussion regarding the WBT. Ask questions to gauge their understanding of the content that was covered, and allow your team to present any questions they might have.

Sample questions that you might present during this time include, but are not limited to, the following:

- *How do you currently determine the right time to attempt to close a sale? What signs do you look for from the customer?*
- *Do you use signs and signals from the customer to tailor your closing technique appropriately?*
- *Is your process for selecting a closing technique typically successful?*
- *How might the information you gathered from the WBT improve your ability to choose the closing technique that will increase your likelihood of closing sales?*

Distribute Relevant Job Aid

Distribute the job aid titled, *Closing Techniques*.

Distribute Activity Sheets

Distribute the activity sheet titled, *Successfully Closing a Sale*.

Instruct your Sales team to complete this activity sheet prior to the next coaching session. They will share their responses with the group when you reconvene.

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Session 2 Agenda

Review Activity Sheets	Ask each member of your Sales team to share their responses to the questions on the *Successfully Closing a Sale* activity sheet. Lead a group discussion regarding the responses team members provided to each question. Sample questions that you might present during this time include, but are not limited to, the following: ▪ *Did you notice any similarities among the statements you and your teammates make to apply each closing technique?* ▪ *Did hearing your teammates' approach to each closing technique provide ideas for you that might improve your technique(s)? If so, how?* ▪ *What similarities did you notice among the advice you and your teammates would offer a new Sales Consultant for using each closing technique successfully? Why do you think this advice would prove helpful?*
Complete Role Play Exercise	Select a volunteer to participate in the role play exercise with you. Distribute the *Closing the Sale Role Play Checklist* to the remaining team members. Ask them to complete the checklist following each role play scenario. When the role play exercise is complete, engage your team in a brief discussion. Ask team members to share the ratings and comments they recorded on their checklist, and ask them to discuss their observations regarding strengths and weaknesses.

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Activity Sheet: Successfully Closing a Sale

The following activity allows you to identify your current methods of attempting to close a sale and consider ways of improving these methods. Complete this activity prior to your next coaching session and be prepared to share your responses with the team.

1. Complete the table below by entering the buying signs that influence your selection of each closing technique and what you typically say to close the sale.

Closing Technique	Buying Sign(s) that Influence Me to Use this Technique	What I Typically Say to Close the Sale
Direct Close		
Choice Close		
Assumptive Close		

2. In Question #1, you identified how you typically apply each closing technique. Is your approach for each closing technique typically successful for you? Can you think of methods of improving each technique?

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3. Which closing technique do you struggle with most? What makes this technique more difficult than other techniques?

4. What advice for applying each closing technique would you give to a new Sales Consultant? Record your answers in the table below.

Direct Close	
Choice Close	
Assumptive Close	

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Role Play Exercise: Selecting the Right Closing Technique

Directions

1. Select three volunteers from your coaching session to participate in the following role play scenarios. In each scenario, you will assume the role of the customer and your volunteers will assume the role of the Sales Professional.
2. Distribute three copies of the *Closing the Sale Role Play Checklist* that appears on the next page to the observing participants in the coaching session. Instruct them to observe the role play scenarios carefully and complete a role play checklist for each.
3. When you have completed each role play, ask participants to share their observations regarding the volunteer's ability to select the right closing technique and successfully close the sale. Share your own feedback and observations during this time, as well.

Scenario #1

Greg Andrews is a Sales Representative for a major cable, Internet, and communications provider. He is speaking with a customer who has called to significantly reduce her existing cable package. Instead of reducing the customer's cable options, Greg would like the customer to consider adding phone service to her service package. Greg's company is running a promotional package for a limited time. The package will provide the customer with additional products without adding any costs or fees to her existing monthly charges. The customer does not seem very interested in the phone service and frequently redirects the conversation to reducing her cable options.

Greg considers the best approach to add phone to the customer's service package and attempts to close the sale.

Scenario #2

In this scenario, Greg Andrews speaks with a customer who has called to significantly reduce his existing cable package. However, when he mentions the promotional package that will allow him to keep his existing cable channels *and* add phone service to his package without increasing his monthly charges, he is very intrigued. He mentions that he has heard good reviews of the company's phone service and he has been meaning to learn more about it. He originally called to reduce his monthly charges, but the addition of phone service adds enough value to encourage him to reconsider.

Greg considers the best approach to add phone to the customer's service package and attempts to close the sale.

Scenario #3

In this scenario, Greg Andrews speaks with a customer who has called to significantly reduce her existing cable package. When he mentions the promotional package that will allow her to keep her existing cable channels *and* add phone service without increasing her monthly charges, she mentions that the offer sounds interesting, but does not pursue the offer further. Greg detected a hint of interest from the customer, but it was not compelling enough to indicate that she will agree to the sale.

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Greg considers the best approach to add phone to the customer's service package and attempts to close the sale.

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Closing the Sale Role Play Checklist

Carefully observe the role play exercise. Then, use the table below to rate the Sales Consultant's ability to successfully close the sale in this scenario. Use a (+) if the skill was used very effectively; a (✓) if the skill was used, but needs improvement; or a (-) if the skill was used poorly or not at all. Use the Comments column to record specific notes regarding the Sales Consultant's use of each skill.

Skill	Rating	Comments
The Sales Consultant chose the closing technique that was most appropriate for the customer's buying signs.		
The Sales Consultant presented questions that were appropriate for the closing technique he or she selected.		
The Sales Consultant asked for permission to add products and/or services to the customer's account.		
The Sales Consultant asked for permission to bill the customer for additional fees and/or charges.		
The Sales Consultant made arrangements for next steps, such as delivery of products, installation of services, etc.		

Additional Comments and Observations:

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Module 7: Setting Goals

In this module, your team will learn that setting goals and putting them in writing helps them to clearly define their professional objectives and targets for improvement. When they reach those targets, your team members will enjoy a level of satisfaction that motivates and empowers them to continually set and strive for new achievements.

Session Agendas

To maximize learning and ensure time for the completion and discussion of all activities, it is recommended that you dedicate two coaching sessions to the *Setting Goals* module. Proposed agendas for each session are as follows.

Session 1 Agenda

Complete the WBT

Instruct your Sales team to complete the *AcSELLeration: Fundamentals of Selling Skills* WBT module titled, *Setting Goals*.

Group Discussion

Engage your team in a brief group discussion regarding the WBT. Ask questions to gauge their understanding of the content that was covered, and allow your team to present any questions they might have.

Sample questions that you might present during this time include, but are not limited to, the following:

- *Based on all of the information presented in the* ***AcSELLeration: Fundamentals of Selling Skills*** *WBT series, can you identify consultative selling skills that are your strongest? Which skills could use some improvement?*
- *As you completed these modules, did you consider steps you might take for improving your consultative selling skills? Did you set goals or targets for improving these skills? Did you write these goals and targets down?*
- *In your opinion, why does writing goals improve our chances of reaching them?*
- *Prior to completing the Setting Goals WBT, did you consider the five key characteristics of SMART goals when you set goals and targets for yourself? Now that you are familiar with these five characteristics, do you think your goal setting will improve? Why or why not?*

Distribute Relevant Job Aids

Distribute the job aid titled, *Goal Setting at a Glance*.

Distribute Activity Sheets

Distribute the activity sheet titled, *Setting SMART Goals*.

Instruct your Sales team to complete this activity sheet prior to the next coaching session. They will share the information they recorded on their activity sheet with the group when you reconvene.

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Session 2 Agenda

Review Activity Sheets

Ask each member of your Sales team to share their responses to the questions on the *Setting SMART Goals* activity sheet.

Lead a group discussion regarding your team's responses to the activity. Sample questions that you might present during this time include, but are not limited to, the following:

- What similarities did you notice in the way in which you and your teammates ranked your consultative selling skills? What differences did you recognize?
- Did you find it difficult to identify specific action steps you can take to improve the skill you identified as needing improvement? Why or why not?
- Did you have a difficult time writing a goal that met the five SMART criteria? If so, why? How confident do you feel about achieving this goal in the timeframe you identified?
- When do you intend on talking with your Supervisor regarding your SMART goal, and the actions he or she can take to help you meet that goal? Do you think your Supervisor will be receptive to assisting you? Why or why not?

Activity Sheet: Setting SMART Goals

The following activity allows you to reflect on the consultative selling skills that were covered in the *AcSELLeration: Fundamentals of Selling Skills* WBT series, and identify those that are strongest and those that you would like to improve. It also allows you to practice writing SMART goals for improving those skills. Complete this activity prior to your next coaching session and be prepared to share your responses with the team.

1. Read the consultative selling skills that are presented in the table below and rate them as you feel appropriate. Be sure to rate your skills honestly so that you may truly identify those that are strongest and those that need improvement.

Skill	Strongly Agree	Somewhat Agree	Somewhat Disagree	Strongly Disagree
I focus on the wants, needs, and preferences of the customer rather than a specific product or service.				
I have a strong and consistent ability to establish rapport with customers and earn their trust.				
I use the right combination of open and closed probes to interview customers and identify wants, needs, and preferences.				
I listen carefully to customers' responses to questions, their concerns, and their specific needs.				
I paraphrase customer feedback, remain unbiased and unemotional, and note key points of the conversation.				
I have a solid process for overcoming customer objections that frequently allows me to close my sales.				
I recognize the customer's buying signs and select the most appropriate closing technique.				

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2. Select one consultative selling skill that you identified as in need of improvement in Question 1. Write that skill in the space provided in the table below. Then, identify specific action steps you can take to improve this skill and projected completion dates for each action step.

Skill to Improve	Action Steps	Projected Date of Completion

3. Use the information you recorded in Question #2 to write a SMART goal for improving your selected consultative selling skill. Remember that SMART goals are **Specific**, **Measurable**, **Attainable**, **Realistic**, and **Time-bound**.

4. What actions can your Supervisor take to help you achieve the goal you identified above?

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