

Accelerating Sales Skills

Overview



Business-focused sales team members develop broader, deeper relationships, faster by focusing on client goals, values, and priorities.

PROGRAM PURPOSES:

Improve Conversations; Develop Broader, Deeper Relationships

Accelerating Sales Skills is designed to increase yield from sales calls by teaching:

- Focusing and preparing for conversation.
- Facilitating discussion.
- Making recommendations and reaching agreement.
- Following up with the client and the internal team.

Learning Activities – Kick-Off, Classroom, Field Sales Meetings

PREPARATION

The bank confirms its sales process, steps, and call quality criteria (“what good looks like”) for each element of the sales process and sales call. Clarity aligns the program with the bank’s process and criteria.

KICK-OFF

Bank managers meet to:

- Confirm the bank’s expectations for sales call preparation, completion, and follow up.
- Make commitments and set calendar dates for observing and coaching their direct reports’ sales activities.
- Learn the elements of the sales model they’ll be observing and coaching.

Managers then meet with their direct reports, individually, to discuss sales call expectations—focus, frequency, and quality—and to discuss the method and extent to which the managers will observe and coach their direct reports on their sales calls. They also introduce the **Accelerating Sales Skills** training program to their direct reports and, through discussion, agree with their direct reports on the specific points in the training that are the most important for the direct reports’ development.

Clarity Advantage Corporation is a sales acceleration consulting firm. We help companies accelerate sales by focusing value propositions, improving sales processes, and boosting sales manager effectiveness.

Clarity Advantage Corporation
28B Junction Square Drive
P.O. Box 1429
Concord, MA 01742-1429
978-369-4755
www.clarityadvantage.com

PRE-CLASSROOM WORK

Participants complete pre-classroom work including:

- Discussion with their managers about the course (described above).
- A conference call with the Clarity course leader about the course and specific techniques they'll learn.
- A reading about the Business Banking sales model and call process.
- A reading about call preparation and analysis of First Research industry profiles.
- Analysis of a First Research industry profile and development of call questions focused on growth, profitability, asset mix, and risk.

DAYS 1 AND 2 CLASSROOM TRAINING

During the first two days of classroom training, participants complete a series of small group learning activities, extensive role play, and discussions covering:

- The Business Banking Sales Call structure
- Researching, planning, and preparing for calls
 - Analyzing First Research and other industry data to identify critical issues
 - Researching the client or prospect—website, newspapers, network information
 - Developing proactive ideas and suggestions
 - Preparing internal team members or managers who will be on the call
- Facilitating the call

Each of the following sections includes multiple practice or role play opportunities.

 - Opening the call
 - Establishing Priorities, using the Business Priorities tool
 - Exploring, using a value-focused probing approach
 - Cash Flow (using the Cash Flow Conversation model)
 - High Urgency Priorities discovered using the Business Priorities tool
 - Ripple Effects – implications of issues identified in pre-call planning or through the conversation to this point
 - Presenting Ideas or Solutions
 - Closing
- Following up after the call
 - Confirming call outcomes, next steps, and responsibilities with the client
 - Writing a meaningful call report
 - Communicating essential issues to partners (what they need to know and how they need to know it)

CLASSROOM DAY 3

Day 3 is an optional day for video-taped and/or audio-taped role play for coaching. We provide participants with incomplete information about a customer and a matching First Research industry profile. Participants then complete each step of the calling process. When the audio or video tape is rolling, the coach/trainer plays the customer role.

- **Research, Planning, and Preparing.** Participants work individually and then in small groups to prepare a call plan and questions. They review these with the coach/trainer and receive feedback.
- **Facilitating the Call.** Participants role play some or all portions of the planned sales call with the course leader. Their efforts are recorded. When all members of the small group have completed their taped performances, the coach/trainer leads small group discussion to critique and coach the calls using the same quality criteria that sales managers will use in field observation calls.
- **Following Up After the Call.** Participants work individually and then in small groups to prepare a call report and “referral” to an internal partner. They review these with the coach/trainer and receive feedback.

Post-Training Conference Calls

One week, three weeks, and five weeks following the classroom training, Clarity recommends one-hour small group conference call clinics in which participants share their experiences with the Clarity tools. The Clarity coach/trainer comments, re-teaches elements as needed, and encourages participants to continue experimenting with the tools and skills.

Support Tools

The support tools include:

- “Quality” criteria for sales skills (“What Good Looks Like”)
- Call Preparation Worksheets for sellers
- Call Observation Worksheet for coach (so sellers know what the worksheet includes)
- Business Priorities tool
- Cash Flow Conversation tool
- Present Ideas and Solutions worksheet
- Ripple Effects tool
- Referral Communications form (if appropriate and approved by internal partners)
- Call Report template (if needed and when approved by the bank)
- Call Review and Plan Action worksheet for seller and coach

Variations

Following the course, Clarity can set up “remote role play” coaching of sellers by telephone, in which they role play with a Clarity coach or a colleague, then receive coaching from Clarity following the role play. We also offer individual coaching for sellers—a “hot line” business bankers can call for help with real sales situations.