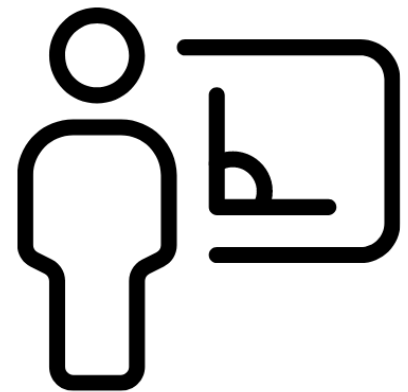


Instructors Guide



On the following pages is a sample module from our Instructor Guide. It provides the instructor with a copy of the material and a Lesson Plans box.

The key benefit for the trainer is the Lesson Plan box. It provides a standardized set of tools to assist the instructor for each lesson. The Lesson Plan box gives an estimated time to complete the lesson, any materials that are needed for the lesson, recommended activities, and additional points to assist in delivering the lessons such as Stories to Share and Delivery Tips.



You don't close a sale, you open a relationship if you want to build a long-term, successful enterprise.

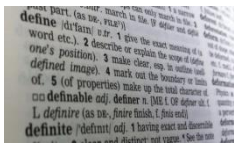
Patricia Fripp

Module Two: In-Person Sales



Direct sales, such as in-person sales, help you to connect with customers and move them through the sales process. Understanding the definition of in-person sales as well as their benefits, costs, and effectiveness will help improve interaction and sales.

Definition



In-person sales occur when you are working directly with the client at an individual level. Traditionally, in-person selling was defined as face-to-face meetings onsite. With modern technology, other methods of communication are included in the definition. This selling takes place in-person or through methods of direct

communication, including:

- Sales Calls
- Face Time
- Meetings
- Retail Settings

With each method of in-person sales, the focus is connecting with unique clients.

Estimated Time	7 minutes
Topic Objective	Review the definition of in-person sales.
Topic Summary	Definition

	Discuss the definition of in-person sales.
Materials Required	Flipchart/board, marker
Planning Checklist	None
Recommended Activity	As a group, discuss your experience with in-person communication. List what participants believe about sales on the flipchart/board.
Stories to Share	Share any personal, relevant stories.
Delivery Tips	Encourage everyone to participate.
Review Questions	At which level does in-person sales occur?

Benefits

In-person communication provides several benefits to the sales process. The main benefit is the ability to develop relationships. As the relationships grow, so do the benefits of the sales technique.



Build Trust

Demonstrate Product

Easier Close

Generate Referrals

There are clear benefits of in-person sales that can lead to lasting advantages for the sales person and the company.

Estimated Time	8 minutes
Topic Objective	Consider the benefits of in-person sales.
Topic Summary	Benefits Discuss the benefits of in-person sales.
Materials Required	Flipchart/board and marker
Planning Checklist	None
Recommended Activity	Discuss the benefits of in-person sales as a group and consider examples of each. Write ideas on the flipchart/board.
Stories to Share	Share any personal, relevant stories.
Delivery Tips	Encourage everyone to participate.
Review Questions	What are benefits of in-person sales?

Cost



When using in-person sales, it is important to weigh the costs against the benefits. A single sales call could pay for hundreds of advertisements. The costs differ depending on the method of sales used. For example, a sales call or FaceTime conversation takes time and technology. A retail environment would have additional costs of overhead.

No matter the method used, a specialized sales force that connects with individual customers will have the highest cost. The high cost; however, should not cause anyone to dismiss using in-person sales because it is an extremely effective sales technique.

Estimated Time	8 minutes
Topic Objective	Review the cost of in-person sales.
Topic Summary	Cost Discuss the cost of in-person sales.
Materials Required	Flipchart/board and marker

Planning Checklist	None.
Recommended Activity	As a group, discuss the different potential cost for different in-person settings. List answers on the flipchart/board.
Stories to Share	Share any personal, relevant stories.
Delivery Tips	Encourage everyone to participate.
Review Questions	What must be weighed against costs?

Effectiveness



The cost of in-person sales may be intimidating. Additionally, it is not the most efficient sales channel. Still, connecting with customers on a personal level has a profound effect on them. In fact, in-person and other specialized methods that reach clients are the most effective selling techniques.

Face-to-face interactions distinguish sales people, which increases their success.

The REED Research group, for example, noted that most customers have 4.6 sales calls a week and only 1.8 in-person meetings. While it does take more effort and money, in-person connections stand out in the buyers' minds and improve the chance of conversion.

Estimated Time	7 minutes
Topic Objective	Review the effectiveness of in-person sales.
Topic Summary	Effectiveness Discuss the effectiveness of in-person sales.
Materials Required	Flipchart/board, marker
Planning Checklist	None
Recommended Activity	As a group, rank which methods of communication get more of your attention. Place this on the flipchart/board.
Stories to Share	Share any personal, relevant stories.
Delivery Tips	Encourage everyone to participate.
Review Questions	What is intimidating?

Practical Illustration



Tom and Christie worked for the same insurance company. Tom was determined to be the top seller, but Christie repeatedly took this title. He observed her carefully to see how she was so successful. He noticed that she was out of the office twice as often as anyone else in the company. He relied on advertisements and emails to bring in most of his prospects and rarely met any of his customers face-to-face. Christie's customers seemed to move through the sales funnel faster than his and purchase at a higher rate. Tom was concerned that the time away from the office might hurt his sales, but he decided to give it a try in the next month.

Module Two: Review Questions

1.) What is the traditional in-person sales?

- a) Individual
- b) None
- c) Offsite
- d) Face-to-face

In-person sales occur when you are working directly with the client at an individual level. Traditionally, in-person selling originally was defined as face-to-face meetings onsite.

2.) What has changed in-person selling?

- a) Nothing
- b) Activities
- c) Assessments
- d) Technology

Traditionally, in-person selling originally was defined as face-to-face meetings onsite. With modern technology, other methods of communication are included in the definition.

3.) What is the main benefit of in-person sales?

- a) Demonstrate product
- b) Relationships
- c) Close
- d) Unknown

In-person communication provides several benefits to the sales process. The main benefit is the ability to develop relationships. As the relationships grow, so do the benefits of the sales technique.

4.) Who benefits from in-person sales?

- a) Company
- b) Unknown
- c) Sales person
- d) A & C

There are clear benefits of in-person sales that can lead to lasting advantages for the sales person as well as the company.

5.) What has the highest cost?

- a) Retail
- b) Specialized sales force
- c) Conversion
- d) All of the above

No matter the method used, a specialized sales force that connects with individual customers will have the highest cost.

6.) What determines the cost of in-person sales?

- a) Methods
- b) Face Time
- c) Overhead
- d) None of the above

The costs differ depending on the method of sales used. For example, a sales call or Face Time conversation takes time and technology. A retail environment would have additional costs of overhead.

7.) What is the most effective sales technique?

- a) Online
- b) Specialized
- c) Print
- d) All of the above

Connecting with customers on a personal level has a profound effect on them. In fact, in-person and other specialized methods that reach clients are the most effective selling techniques.

8.) How many in-person meetings do most customers average in a week?

- a) 4.6
- b) 1.8
- c) 2.7
- d) None

The REED Research group, for example, noted that most customers have 4.6 sales calls a week and only 1.8 in-person meetings.

9.) Direct sales help you to connect with _____ and move them through the sales process

- a) Sales people
- b) Customers
- c) Investors
- d) None of the above

Direct sales, such as in-person sales, help you to connect with customers and move them through the sales process

10.) In-person sales occur when you are working directly with the client at a/an _____ level.

- a) Impersonal
- b) Sales
- c) Advertising
- d) Individual

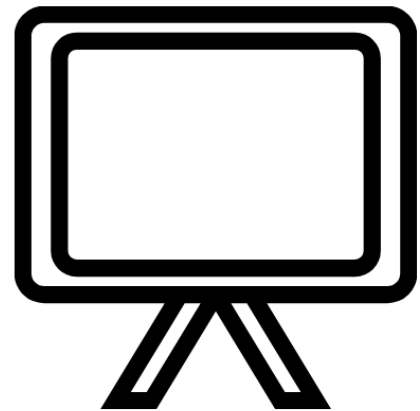
In-person sales occur when you are working directly with the client at an individual level.

PowerPoint Slides



Below you will find the PowerPoint sample. The slides are based on and created from the Instructor Guide.

PowerPoint slides are a great tool to use during the facilitation of the material; they help to focus on the important points of information presented during the training.





“

You don't close a sale, you open a relationship if you want to build a long-term, successful enterprise.

Patricia Fripp

MODULE TWO

In-Person Sales

Understanding the definition of in-person sales as well as their benefits, costs, and effectiveness will help improve interaction and sales.



Definition



Benefits

- Build Trust
- Demonstrate Product
- Easier Close
- Generate Referrals





Cost

No matter the method used, a specialized sales force that connects with individual customers will have the highest cost.

Effectiveness

Face-to-face interactions distinguish sales people, which increases their success.



Practical Illustration



- Definition
- Benefits
- Cost
- Effectiveness

Module Two: Review Questions

1. What is the traditional in-person sales?

A. Individual

B. None

C. Offsite

D. Face-to-face

Quick Reference Sheets



Below is an example of our Quick Reference Sheets. They are used to provide the participants with a quick way to reference the material after the course has been completed. They can be customized by the trainer to provide the material deemed the most important. They are a way the participants can look back and reference the material at a later date. They are also very useful as a take-away from the workshop when branded. When a participant leaves with a Quick Reference Sheet it provides a great way to promote future business.



In-Person Sales

Quick Reference Sheet



Definition

In-person sales occur when you are working directly with the client at an individual level. Traditionally, in-person selling was defined as face-to-face meetings onsite. With modern technology, other methods of communication are included in the definition. This selling takes place in-person, or through methods of direct communication, including:

- Sales Calls



- Face Time



- Meetings



- Retail Settings



With each method of in-person sales, the focus is connecting with individual clients.

Tie the Information to Customer Values

By this time, you should know what your customer values based on the demographics and interactions. Any information that you have should be framed with these values in mind. For example, tell stories about how the product saves money or benefits families better than the competition.



Evidence, such as customer comments or trials, will help convince customers that you speak to their values and will provide for their needs. Any information that relates to values should be packed into your presentation.

Make the Process Easy

The buying process should be as simple as possible. Take the time to examine possible barriers to sales and discover ways to simplify the process. Each business and customer need is unique, so take a careful look at your business and compare it with similar organizations. Ways to simplify the sales process include:

- Payment methods accepted
- Packaging
- Automatic payments for repeat orders
- Customer support
- Contracts



These are just a few areas to consider when simplifying the buying process. Remember that customers are attracted to companies that simplify their lives.

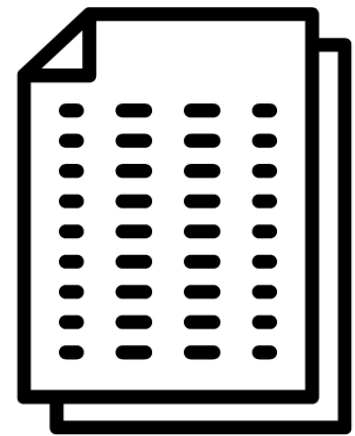
Handouts



Each course is provided with a wide range of worksheets.

Worksheets help check your participants' understanding. If a lesson calls for a worksheet, it will be listed in the Lesson Plan box under Materials Required. All worksheets are customizable and can be found in the Appendix of the Instructor Guide and the Training Manual.

As a trainer, icebreakers give your participants the opportunity to get to know each other better or simply begin the training session on a positive note. Icebreakers promote collaboration, increase engagement, and make your training more light-hearted and fun. Below is an example from the Icebreakers folder.



Icebreaker: Hello, My Name Is...

Option 1:

Method: Perhaps the easiest, most obvious and often overlooked icebreaker.

Ask each member of the training event to introduce themselves by saying *Hello – My Name Is...*

Then encourage the rest of the group to ask the trainee questions. To illustrate,

- Where do you live?
- What is your job?
- Where did you go to school?
- etc

This exercise also encourages questioning and listening skills within the group.

Discussion Questions

1. Did anyone feel uncomfortable doing this exercise? Is so, why?
2. How can this exercise help us during today's training event?

Time: Maximum time 15 minutes

Option 2:

1. Have the participants at each table answer the following questions:
 - a. Why are they here?
 - b. What is their level of experience with In-Person Sales?
 - c. What they hope to get from this class?
 - d. What is the most interesting thing they have ever done in their lives?
2. Have someone be designated a scribe and have them jot down the answers to question C above.
3. On a separate piece of paper, have them write down the most interesting thing done from only one table member.
4. Have the scribe hand the note with the answers to question C to you.
5. Have the scribe stand and introduce the table to the class.
6. Then have the scribe share the most interesting thing from their group.

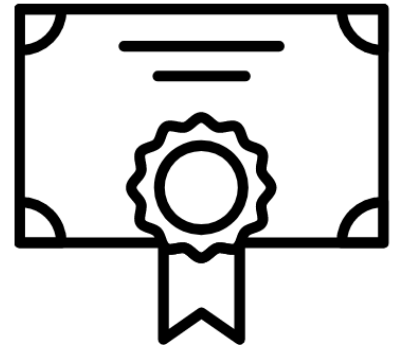
7. Have the class guess whom that person is, which did the most experiencing thing.
8. Go around to each table until all have given you their answers to question C and shared their most interesting thing.
9. Debrief by sharing all the answers to question C with the class.

Thank participants for sharing.

Certificate of Completion



Every course comes with a Certificate of Completion where the participants can be recognized for completing the course. It provides a record of their attendance and to be recognized for their participation in the workshop.



CERTIFICATE OF COMPLETION

[Name]

*Has mastered the course
In Person Sales*

Awarded this _____ day of _____, 20____

Presenter Name and Title
