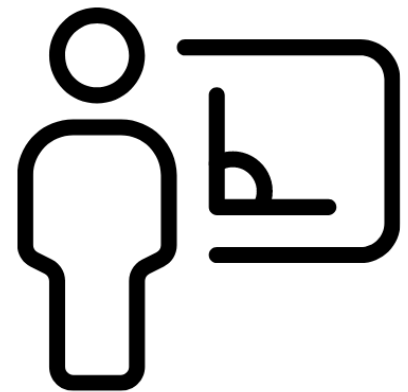


# Instructors Guide



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.



*Sales are contingent on the attitude of the salesman, not the attitude of the prospect.*

***William Clement Stone***

## Module Two: Prospecting



Prospecting is essential to any sales endeavor, but is often overlooked or poorly implemented. In order for prospecting to be successful, it is essential that it become both a priority and a habit. Additionally, it is essential that you understand your prospect and choose your methods of communication appropriately. Implementing these steps will help to improve prospecting results.

### Make It a Priority



Although everyone knows that prospecting is important to the success of any company that relies on sales, it rarely becomes a priority. It is often put off in favor of tasks that provide instant gratification. Prospecting must become a priority. This requires:

- **Scheduling:** Choose a time for prospecting. Many experts advise people to schedule prospecting early in the day, but you need to choose the time that is effective for you and your prospects
- **Preparation:** Prepare what you will say ahead of time, but be flexible. Do not simply read a script.
- **Professionalism:** Remain professional throughout the process. Do not allow a negative attitude towards prospecting affect your communication.

<b>Estimated Time</b>	<b>8 minutes</b>
<b>Topic Objective</b>	Introduce how to make prospecting a priority.

<b>Topic Summary</b>	<b>Make It a Priority</b> Discuss the importance of prospecting.
<b>Materials Required</b>	<b>Flipchart/board and marker</b>
<b>Planning Checklist</b>	None
<b>Recommended Activity</b>	As a group, discuss when you choose to work on prospecting. Make a list on the flipchart/board of times that people have found to be effective. Additionally, share preparation techniques and list these ideas on the flipchart/board.
<b>Stories to Share</b>	Share any personal or relevant stories.
<b>Delivery Tips</b>	Encourage everyone to participate.
<b>Review Questions</b>	What is required in order to make the prospecting a priority?

## Identify Your Ideal Prospect



Prospecting is time consuming, which is why it is necessary to identify ideal prospects before beginning the process. Your ideal prospect is your ideal customer. Your company is able to fulfill the needs and wants of your ideal customer. Conduct research to determine who benefits from your product. The information that you must find beyond how your product meets client needs includes the following:

- Values and priorities
- Budgets
- Age
- Gender
- Buying habits
- Profession
- Interests

Once you have identified the ideal customer, you will be able to focus time on prospects who are likely to become your customers.

<b>Estimated Time</b>	<b>8 minutes</b>
<b>Topic Objective</b>	Introduce ideal prospects.

<b>Topic Summary</b>	<b>Identify Your Ideal Prospect</b> Explore creative problem solving.
<b>Materials Required</b>	<a href="#">Worksheet 1: Ideal</a>
<b>Planning Checklist</b>	None
<b>Recommended Activity</b>	Complete the worksheet individually. Share your answers with the rest of the class.
<b>Stories to Share</b>	Share any personal relevant stories.
<b>Delivery Tips</b>	Encourage everyone to participate.
<b>Review Questions</b>	Who is the ideal prospect?

## Choose Prospecting Methods



There are numerous prospecting methods available, and we will cover them in greater depth in a later module. While you will probably choose multiple methods of prospecting, you must focus your energy on methods that your prospects will respond to when they are exposed to them. For example, younger prospects are less likely to respond to cold calling and more likely to respond to social networking and webinars. Prospecting methods that are commonly used include:

- Cold calling
- Referrals
- Content marketing
- Email marketing
- Networking
- Seminars
- Social networking
- Webinars
- Advertising

<b>Estimated Time</b>	<b>8 minutes</b>
<b>Topic Objective</b>	Introduce prospecting methods.
<b>Topic Summary</b>	<b>Choose Prospecting Methods</b>

	Consider the different prospecting methods.
<b>Materials Required</b>	<b>Flipchart/board and marker</b>
<b>Planning Checklist</b>	None
<b>Recommended Activity</b>	As a group, discuss your experiences using the different prospecting methods. List each method on the board along with the pros and cons of each.
<b>Stories to Share</b>	Share any personal, relevant stories.
<b>Delivery Tips</b>	Encourage everyone to participate.
<b>Review Questions</b>	How many prospecting methods are used at a time?

## Make It a Habit



It is not enough for prospecting to become a priority; it needs to become a habit. There is a common misconception that habits are easily made within 21 days. Recent studies, however, show that it takes roughly 66 to 200 days. When you first decide to make a new habit, the first few days are easy. After the honeymoon phase ends, it is easy to become disillusioned and fall back into old habits. When this happens, it is important to focus on the positive outcomes and follow your schedule of prospecting activities. After struggling through this phase, prospecting will become second nature. In order to truly make prospecting a habit, you need to ensure that you are working at it daily.

<b>Estimated Time</b>	<b>7 minutes</b>
<b>Topic Objective</b>	Consider habits.
<b>Topic Summary</b>	<b>Make It a Habit</b> Discuss habits.
<b>Materials Required</b>	<a href="#">Worksheet 2: Habit</a>
<b>Planning Checklist</b>	None
<b>Recommended Activity</b>	Complete the worksheet individually. Share your answers with the rest of the class.
<b>Stories to Share</b>	Share any personal, relevant stories.

<b>Delivery Tips</b>	Encourage everyone to participate.
<b>Review Questions</b>	What should prospecting become?

## Practical Illustration



Henry and Jim are both experienced at sales. Jim spends an hour each day prospecting. Henry spends half that time, but he continually makes higher sales than Jim does. Jim is frustrated that so much of his time seems to be wasted. He decides to discuss Henry's strategy with him. Henry explains that he carefully screens people to find prospects that are most likely to become customers. By focusing on ideal prospects, Henry is able to close more sales. Jim realizes that he needs to focus on finding the best prospects rather than spending time contacting people who are unlikely customers.

## Module Two: Review Questions

1.) What needs to be avoided in prospecting?

- a) Positivity
- b) Negativity
- c) Written communication
- d) Oral communication

It is important to make sure that you remain positive when prospecting. This improves professionalism and communication.

2.) What is NOT necessary for making prospecting a priority?

- a) Schedule
- b) Professionalism
- c) Preparation
- d) Values

Values are necessary to determine the best prospect. The other answer choices help make prospecting a priority.

3.) What is necessary to find the ideal prospect?

- a) Research
- b) Objectivity
- c) Promotion
- d) All of the above

The ideal prospect requires finding the ideal customer. Research must be done to identify the correct prospect.

4.) When should the ideal prospect be found?

- a) During prospecting
- b) After prospecting
- c) Before prospecting
- d) It does not matter

The ideal prospect should be identified before the prospecting begins. This allows the sales person to focus on prospects who are likely to become customers.

5.) What will determine which type of prospecting methods should be the focus?

- a) Interest
- b) The prospect
- c) Priority
- d) CEO

Different methods are used for different prospects. The prospect will determine the focus of the methods used.

6.) What is less likely to be effective on younger prospects?

- a) Seminars
- b) Webinars
- c) Social media
- d) Cold calling

Cold calling is more effective on older prospects that spend more time talking on the phone. The other answers are more effective for younger prospects.

7.) When is it easier to attempt to make prospecting a habit?

- a) At the beginning
- b) Never
- c) At 21 days
- d) After a week

New habits are always easier to attempt at the beginning. After the honeymoon phase ends, however, the process becomes difficult.

8.) How often should prospecting be done to ensure that a habit forms?

- a) Frequently
- b) Weekly
- c) Daily
- d) It does not matter

Actions that need to become habits should be practiced daily. This will help the action to become a habit.



9.) Prospecting is essential to any \_\_\_\_\_, but is often overlooked or poorly implemented.?

- a) Business
- b) Sales endeavor
- c) Social media site
- d) Customer

Prospecting is essential to any sales endeavor, but is often overlooked or poorly implemented.

10.) Prospecting rarely becomes a priority, and is often put off in favor of tasks that provide \_\_\_\_\_.

- a) More money
- b) Instant gratification
- c) Praise
- d) None of the above

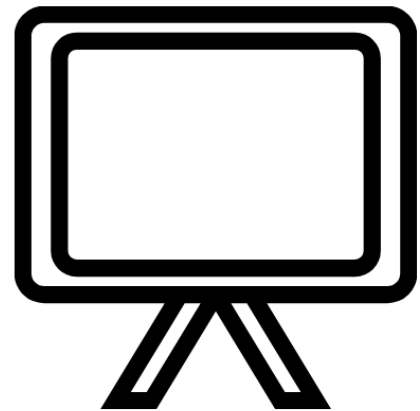
It rarely becomes a priority. It is often put off in favor of tasks that provide instant gratification.

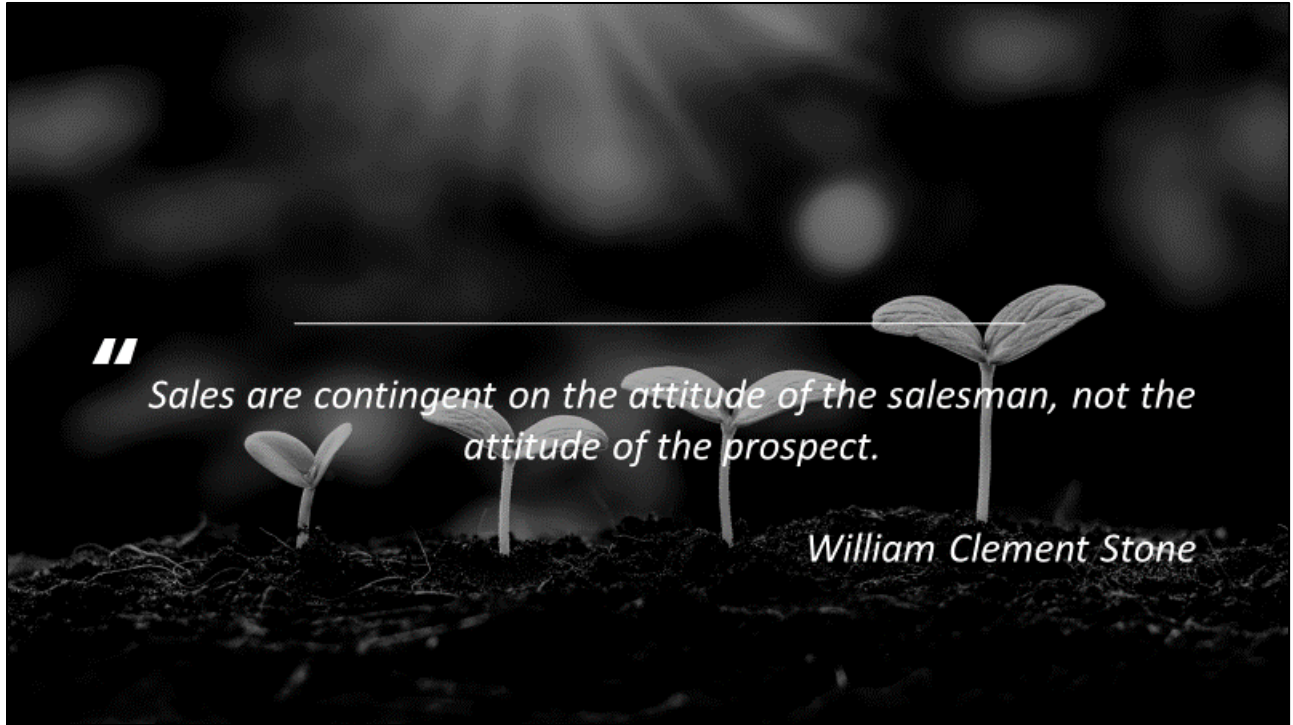
# PowerPoint Slides



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.





MODULE TWO

## Prospecting

Prospecting is essential to any sales endeavor, but is often overlooked or poorly implemented. In order for prospecting to be successful, it is essential that it become both a priority and a habit.



# Make It a Priority

---



# Identify Your Ideal Prospect

---

- Values and priorities
- Budgets
- Age
- Buying habits





## Choose Prospecting Methods

---

Cold calling

Content marketing

Social networking

## Make It a Habit

---

It is not enough for prospecting to become a priority; it needs to become a habit.



## Practical Illustration



- Make It a Priority
- Identify Your Ideal Prospect
- Choose Prospecting Methods
- Make It a Habit

## Module Two: Review Questions

1. What needs to be avoided in prospecting?

A. Positivity

B. Negativity

C. Written communication

D. Oral communication

# 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.





# Prospecting and Lead Generation

## Quick Reference Sheet



### Choose Prospecting Methods

While there are numerous prospecting methods available, you must focus your energy on methods that your prospects will respond to. For example, younger prospects are less likely to respond to cold calling and more likely to respond to social networking and webinars. Prospecting methods that are commonly used include:

- Cold calling
- Referrals
- Content marketing
- Email marketing
- Networking
- Seminars
- Social networking
- Webinars
- Advertising



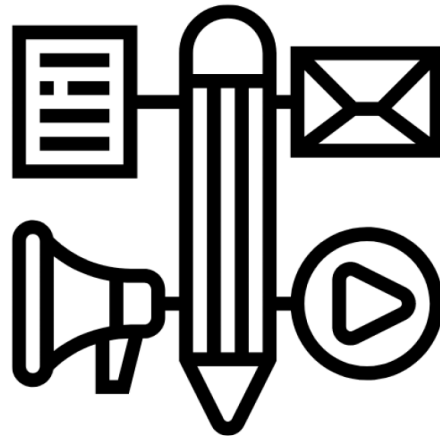
### Content Creation

Never underestimate the importance of creating impressive content. It must be professional and informative. There are many avenues of content creation, and you can develop it yourself or hire an expert.

Types of Content You Can Create:

- Newsletters
- Case studies
- Blogs/ Vlogs (video blogs)
- Podcasts
- Webinars
- Social media
- Interviews
- Books

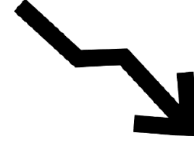
Once you have created content, you need to do everything you can to share it. Apply the skills in marketing methods to help spread your knowledge.





## Failure to Provide Value

Prospecting and lead generation is often relegated to the sale's pitch. People do not want to feel like they are being forced to listen to an individual who is only interested in their money. Failure to provide value will almost always result in potential customers tuning out your message. Remember to always provide value when you are prospecting and generating leads.



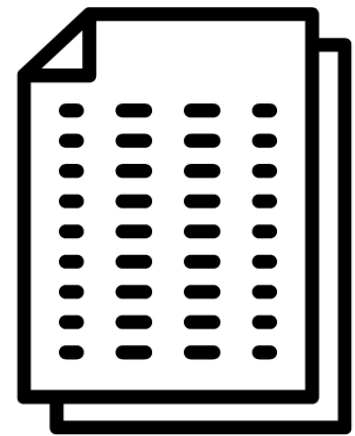
# Handouts



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.





## Sample Worksheet 2

# *Habit*

Take a few minutes to consider the positive benefits of prospecting. Make a list of benefits that will help you continue when you are tempted to fall back into old habits.

---

---

---

---

---

---

---

# Icebreaker: House of Cards

## PURPOSE

1. To help participants get to know each other
2. To identify participants' goals for the session

## MATERIALS REQUIRED

3. One playing card per participant, with an equal amount of cards from each suit
4. Several sets of markers
5. Flip chart paper

## PREPARATION

Pass out one playing card to each participant, face-down.

## ACTIVITY

On your cue, ask participants to turn over their playing cards. They are to find others with their suit, but they are not allowed to talk or show their card. For example, if a person had a spade, they may illustrate that by pretending to dig a hole.

Once participants are in their groups, they are to introduce themselves and come up with a list of five things that they would like to learn during the workshop.

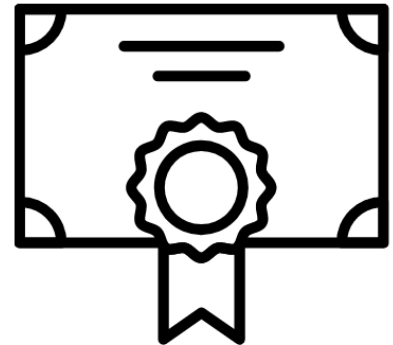
## DEBRIEF

Once groups have created their list, bring participants back together. Have each group present their list and combine topics on the flip chart. Use this as a guide during the workshop. If there are any topics that will not be covered, let participants know where they can find more resources (such as follow-up workshops or materials from the Recommended Reading List).

# 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  
Prospecting and Lead Generation*

Awarded this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_

Presenter Name and Title

\_\_\_\_\_