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9471 Instructional Design
Main Project

My main project is designed around start up training for our field sales staff. Start up training is two days long and covers everything from company indoctrination, expectations of the salesperson and administrative tasks. The most important outcome of training is to build a new hire's skills so they can begin to conduct client meetings and SELL! I've isolated this segment of start up training for my project since this is the most important outcome. New hires are known as Photography Consultants and I will refer to them as PCs for the majority of the project. The name of my company has been left out and replaced with XXX.

The general outline of my training is listed below. Quotes and recollections from test subjects and work produced during trial sessionare designated by the yellow highlight (like this). I included all sections of training from the facilitator's guide for flow but did not comment on every section. This is a live training session and training material consists of the Start-Up training workbook and the PC Handbook used as a reference guide. Though this part of training would usually start on day 1 and then finish up on day 2, I am completing it all in one day because I am not covering the initial part of regular start up training.

Intended Learning Outcomes

- Photography Consultants will be able to conduct a client meeting following the 7 steps of a model meeting and score a minimum of 8 out of 14 possible points on the meeting observation checklist.
- Using a consultative approach, Photography Consultant will be able to recommend the best package for a bride by linking features to benefits
- Photography Consultant will be able to describe the primary differentiating features of each package
- Photography Consultants will be able to overcome the most commonly given objections

Course Agenda

- Sales: Make it a Win, Win, Win Situation!
- Consultative Selling vs. Product Based Selling
- 7 Steps of a Model Meeting
- Practice Makes Perfect, Role-Play Extravaganza

<u>Sales: Make it a Win, Win, Win Situation!</u>

Review of Pre-Training Assignment:

Trainer will review the pre-training assignment and ask participants to share their answers to the two questions: “What brought you to our XXX?” and “What excites you most about being a Photography Consultant?”

Trainer will share a personal story about why he/she started to work for XXX.

Trainer notes:

- Your job in this section is to be an ambassador for the company and sell the benefits of being part of our amazing organization
- Pay careful attention to the answers the PC gives you. Throughout the training, you should help connect the dots for the PC about how this job fits in with their primary motivating factor(s). The 4 motivating factors are:
  1. Money (commissions!)
  2. Having a positive impact (helping a bride make their dreams come true)
  3. Helping grow a company (more sales = more profit, XXX spreading to new markets, even internationally! Potential pay off for those that help build the organization, new positions created, ie DMs)
  4. Development (we is a great place to develop and learn selling skills, account management, etc)

<u>*Sample script*</u>*: Thanks for sharing! One of our core values at XXX is to make things a win, win, win situation. No where is this more apparent that in the sale. When we successfully close a sale, it’s a win for the bride because they have peace of mind in knowing one of the most important aspects of their lives will be captured well. It’s a win for you because every sale you close means money in your pocket (or substitute another motivating factor). And it’s a win for XXX because it helps us achieve our financial commitment to our investors.*

When the participants shared their reasons for working at our company, they all cited the flexible schedule that allows them to work nights and weekends for additional income. One learner also stated that they wanted to work in the wedding industry. I used the sample script listed above and then also shared my reasons for joining which included looking for additional income while I was planning my wedding and how since then I’ve been able to grow with the company into a new position created last year. By sharing my own story, I was able to bring together all 4 of the motivating factors.

Sales Background:

Trainer will now connect the dots for the PCs regarding “selling” and show the PC that they probably use selling skills in their every day life even if they don’t call it that. They will do this asking the question: “Tell me about a time when you had to convince a friend or family member to do something they did not want to do”. Based on the PC answer, the trainer will highlight how they “sold” their friend on it using classic sales techniques (probing and asking questions, sharing the benefits and positive outcomes, overcome objections, listening, probing. Trainer will prepare their own story of “selling” to share with PCs if they are unable to provide their own story. In this scenario, trainer will ask PC to pick out different sales techniques used by trainer in their story.

I opened this section up by asking everyone if they thought of themselves as natural salespeople. One person raised their hand and the others didn’t. I then asked them to share the time when they had to be convincing. There was a bit of silence and the learner who considered himself to be a salesperson talked about how this past weekend, he had tickets to a concert and was trying to convince his friend to go with him. After his story, I asked the other two who did not share a story to pick out what aspects were used that were considered sales. They listed: persuasion, telling the friend why it would be a good idea and persistence. I concluded by saying that I also noticed he highlighted benefits his friend did not immediately see as pros of going to the concert, overcoming objections and listening. After this story, to get the other two involved, I asked if they had ever used similar skills in convincing someone to do something they didn't want to and they said yes.

Transition: *"Now that we've established that we all have natural selling skills, let's talk about XXX and what we offer to brides"*

Trainer will ask the following questions:

- What do you think are the major reasons brides should reserve with our company? What do you think sets us apart?
- What do you think about our packages and offerings?

Responses given by learners included:

- ➔ Quality of photographers
- ➔ Having an expert guide them through the photography selection process
- ➔ Good value, get a lot for your money
- ➔ Connection with their PC

My purpose for including this was to probe for prior knowledge and to see whether or not the participants had done their pre-training work which included reviewing our product and price sheet as well as reading portions of the handbook including history of the company, etc. Because my learners were not brand new employees, they were all familiar with our offers and gave all the "right" answers. The goal for this section could not really be evaluated because of this but I do think it will work as a summative assessment.

Transition: *"As you've mentioned, XXX is a unique model in the wedding industry and we've designed it to give bride's the best value and service for their money. Because we offer customized packages, it's important that our selling technique that places emphasis on customer needs.*

Consultative Selling vs Product Based Selling:

Trainer will now ask PCs if they have heard of consultative selling and if so, what is it? Trainer fills in any gaps that may be missing or unstated and gives an overview of Consultative Selling and why we use this vs product based selling.

Consultative Selling:

- Is also known as needs based selling
- Emphasizes <u>*customer needs*</u> and meeting those needs with solutions combining products and/or services.
- Requires higher level selling skills

Product Based Selling:

- Emphasizes the product
- Works well for transactional sales

Trainer Notes:

- We use consultative selling because it allows us to thoroughly understand a client's needs and make a recommendation based on their unique needs.

After introducing the concept of consultative selling, review the basic steps of a consultative sale: Build Rapport → Understand the Need → Make the Recommendation → Close the Sale. Then review the 7 steps to a model meeting and show how they fall into the consultative sales process.

Consultative Sales Process	7 Steps in a Model Meeting
Build Rapport	Introduction
Understand the Need	Probe and Connect
	Present Company
	Review Portfolios and Albums
Make the Recommendation	Present Packages
	Address/overcome concerns and objections
Close the Sale	Close the Sale

Trainer notes:

- Reference pg 16 of the handbook for model meeting steps
- Be sure to tell them that even though the steps are listed out sequentially, the individual steps can occur at any point in the sales cycle. For example, you may get an objection immediately when you begin talking with the bride. Even though you are still working on building rapport, you may need to jump into overcoming objections.

Transition: *"Let's break down each segment of the 7 steps in more depth"*

Again, because my learners were not new to the sales process, this part went pretty smoothly and I didn't have to fill in very many gaps. In the participant guide, the above chart is filled in on the consultative sales side but blank on the 7 steps side and as a group we went through which part of the model meeting fell into which part of the consultative sales process. My learners allowed me to guide the discussion and I did not have to be very directive. I can see that with a group that lacks sales experience, I would have to ask a lot more leading questions in order to get the chart filled in correctly.

7 Steps to a Model Meeting

Trainer notes:

- Set expectations of how this section will proceed. You will review the components of each of the 7 steps and then after, you will be modeling it to show them how it should come together.

1) Introduction: Trainer will describe the basic elements about how to complete this phase. It will be broken down into actions vs. rapport building tips
   a. Actions: Offer to purchase a drink for the clients, set the agenda, show them the photography slideshow
   b. Rapport Building Tips: Make eye contact, smile, be enthusiastic and personable

   Trainer notes:

   - Reference pg 16 of handbook
   - Emphasize that this is one of the most important steps in the sales process! If you don't establish good rapport the bride won't trust you
   - Observation is an important here as you'll want to pick up the basic personality of the bride. Are they enthusiastic? Are they cautious? These signals will help you determine how you should interact with them. For example, if you have a mellow, get to the point bride, they will resent someone who is too bubbly and energetic.

2) Probe and Connect: In this segment, Trainer will review the Sales Consultation Guidelines and discuss the importance of question asking to gather appropriate information.

Trainer notes:

- Reference pg 17 of handbook
- The bride should be doing 95% of the talking here
- Question asking serves several purposes:
    1. Gives you key information regarding the bride's preferences, wedding day and
    2. Prepares you for potential objections that may come up later
    3. Establishes credibility – Asking good questions lets the bride know you care about her day and that you are qualified to make photography recommendations
- When reviewing the Consultation Guidelines, solicit PC Feedback on why they think certain questions should be asked, make this interactive!

<u>Sales Consultation Guidelines:</u>

Bride (get contact info):
Groom (get contact info):
Wedding Date:

Ceremony location/details (i.e.: location, special events, indoor/outdoor, religious vs civil):

Reception location/details:

> **Tell me about your day… What do you have planned so far?**
>
> **Where will you be getting ready prior to the ceremony? Are you interested in preparation photography?**
>
> **Can you tell me more about the event timeline (use this info to build a photography time line)?**
>
> **Do you want to be separated before the ceremony (if not this creates time for photos to be taken)?**
>
> **How many people in your wedding part (flower girls and ring bearers too)? How any guests approximately?**
>
> **Any special cultural or familial events to take place at the reception? Traditional wedding moments such as cake- cutting, first dances, etc?**
>
> **Any special photo requests that are "out of the bx"?**
>
> **What are your style preferences? Are you interested in candid photojournalism (explain what photojournalism means to us) or traditional? Combination of both? Interested in artistic photography or more technically perfect images?**
>
> **What re the top 3 things that are MOST important to you? B&W – cooler mix, interest in negatives, album, etc?**
>
> **Have you secured other vendors (DJ, Florist, etc – if not offer recommendations if appropriate)?**
>
> **Have you met with other photographers, what have you liked or disliked in what you've learned?**
>
> **What drew you to XXX?**

The group had a nice discussion here after reviewing the questions listed in the consultation guideline. Because they have all sat in on or conducted meetings, they could bring in their personal experiences about questions they like to ask that may not be on the sheet. New PCs are required to attend a meeting prior to training so what I may build into a future revision, is questions about what they have observed to bring this conversational aspect in at this point.

3) Present Company: Trainer will review the "Key Talking Points for the Client Meeting" grid as well as the sample script with learner on how to present and position our company.

   Trainer notes:

   - Reference pg 23 in handbook
   - Have learners take turns reading the Talking points
   - Let them know that these are good sound bites they can use verbatim in the client meeting

Key Talking Points for the Client Meeting

XXX Promise	Talking Points
High Quality Photography	• We specialize in wedding photojournalism – Photojournalism is all about documenting your day and telling the story of your event. We capture the faces, feelings and special moments of your day, not just who was there. • Our photographers are award winning – as evidenced by both industry awards and strong customer accolades. • Our photographers focus 100% on photography – letting them do what they do best which is create art. • Only the best photographers are invited to become XXX photographers. We accept less than 10% of applicants into our certification program. • We have a 100% satisfaction guarantee – we stand behind our work 100%.
Superior Service	• We partner with you to deliver your vision of your day. We match you with a photographer who is best suited to your personal style and we use a Personal Style Guide to work with you to determine your style. • Yes, we will work with you to ensure that you are 100% satisfied with the photographer we select for your day. • We provide a constant point of contact that is responsive to you every step of the way. Supporting your vision are your photographer, your Photography Consultant and your album designer. We're available at any time to help you with your needs. • We will customize our services and style to fit your needs. This is a very different approach than traditional studios.
Superior Value	• We offer more quality and service for the money. • We offer the widest selection of quality albums and include custom design services with every album. • We include high resolution digital negatives with every package. You control your images without copyright restrictions or watermarks. • We deliver your proofs, an electronic version of your album and DVD montage just weeks after your wedding.

4) <u>Review Portfolios and Albums:</u> Trainer will describe the collateral available for client viewing and tell learner why each tool is used
    i. <u>Portfolio:</u> Ascertain client preference for style of photography
        1. At this time trainer will review the "Print Reviewers Guide" to give learner talking points for each photo.
    ii. <u>Albums:</u> To show clients what is available to them

Trainer notes:
- Reference pg 27 in handbook
- Conduct an informal test to make sure learners know the names of the albums are 1 or 2 distinguishing features.
- This part of the meeting is mainly listening to the client and picking up on which photos she likes or dislikes. Share with learner that the more info we gather at this stage, the better we can help with the photographer selection. Have the bride be specific about what it is she likes/does not like about the pictures

5) <u>Present Packages:</u> Trainer will review the package offerings with the learner and together they will complete the "Key Distinguishing Factors" worksheet to help learner understand when to recommend certain packages and why. Case studies will be reviewed after the worksheet to test for learner's ability to recommend the right package based on client needs.

Trainer notes:
- Reference pg 28 in handbook
- Review the Premier Options and guide learners though how to help couple's distinguish which one is most appropriate for them
- Remind them that just because the couple gives you a budget amount, does not mean they intend to stick to it.

Key Distinguishing Factors Worksheet

Package Name/Price (6/8/12 hrs)	Base Album	# of Photographers (Certified)	Premier Options	NOTES
Elegante				
Bellisimo				
Classico				
Dolce				
Simplicity				

Case Study

1) Sally Romance and her fiancé Jim have been planning their wedding for about 6 months. They are getting married in 8 months and have all of their major vendors picked out and the last one they need to cross of their check list is the photographer. They have meet with 2 other photographers before meeting with you. They have set aside a budget of $2,000 for their wedding photography. They are paying for most of the wedding themselves but Sally's parents want to chip in and help as much as they can. Sally would prefer not to burden her parents but will ask if needed. Sally and Jim are a very modern couple and love the new flush mount albums. Even though an album is important to them, they have stated they don't have to have one as part of their package as long as they can get their digital negatives. They know they'll be getting a lot of money as part of their wedding presents and they figure they can always buy one later. They tell you they are most interested in Simplicity.

   They have 6 people in their bridal party, 3 on each side and a ring bearer and flower girl. They want to keep the guest list to 200 but so far, have a head count of 250. They've told you that they want to have as much coverage as possible because there are a lot of out of town guests coming who they don't get to see very often. They want to look back at their pictures and see all of the moments they may have missed including the cocktail hour. They both want getting ready pictures and formal portraits done with them and their bridal part before the wedding. The ceremony starts at 4:30pm and is a full Catholic mass ending at 5:30pm. The cocktail hour starts at 6pm and dinner will be at 7pm. The couple has the reception hall until 1am and would love coverage until then.

2) Becky Lovejoy and her fiancé George are determined to have THE wedding of the year. They are just in the beginning stages of wedding planning but have a very set idea of what they want their day to look and feel like, pure opulence. Becky has brought her own portfolio of wedding pictures she likes from magazines and friends' weddings she's attended. They are getting married at the country club and are planning on having 400 guests. There will be 18 people in the bridal party, 8 on each side, 3 flower girls and 2 ring bearers. The photography is the most important aspect of the wedding for them and they don't want to skimp. Becky's dad is paying for the photography had has told her he won't pay a penny over $4000.

   Becky knows she wants parent albums and wants her main album to be as big as possible. Her event starts with afternoon cocktails at 4pm. The wedding is at 5:30pm ending at 6:00pm. There is an hors d'oeuvres and champagne hour from 6:00 -7:00. They will make their grand entrance at 7:15pm and dinner is served at 7:30pm. The send off is set for midnight.

The case study discussion was really straight forward. Learners all came up with the same basic package to recommend though they did vary on how to recommend add-ons and which ones.

6) Address/Overcome Concerns and Objections: Trainer and Learner will complete the "Common Objections" worksheet together and discuss how to best overcome objections.

   Trainer notes:

   - Reference pg 29 in handbook
   - Remind PCs that even though this is technically step 6, a bride can bring up objections at any point in the sales process, sometimes multiple times!

Common Objections

Why can't I meet my photographer until the day of the wedding?

How do I know your photographers are as good as you say?

I want to handpick my own photographer

I think your prices are too high, Studio X offered me packages for less.

Why do you shoot in digital only?

I want someone who provides photography and video.

We didn't use the Objections sheet as much as I thought. Our handbook lists the objections and sample responses and we ended up reviewing it in that format rather than using the worksheet

6) Closing the Sale: Trainer will describe successful closing tips and will review the sample closing scripts with the PC.

   Trainer Notes

   - Reference pg 32 in handbook
   - Make sure you review how to take a reservation in person and what payment options are allowed
   - After closing the sale, they should be setting the right expectations with the bride about what to expect next.

Modeling/Guided Practice: Trainer will review the meeting checklist rubric used to evaluate consultants during observations. Trainer then completes a reverse role-play with the PC where the trainer plays the consultant and the PC plays the client. PC will evaluate the trainer using the meeting checklist. After the exercise, trainer and PC will de-brief on the role-play.

Meeting Checklist

Meeting Step	0	1	2	SCORE
Intro	Greeting was informal and unprofessional, no agenda or poorly set agenda, client controlled meeting and set the pace	PC set agenda	PC presented him/herself in a warm and inviting manner. Clear agenda set, PC controlled the meeting and set the pace	
Probe and Connect	Did not use Sales Consultation Guidelines, little or no notes taken, PC did most of the talking, several key moments of the wedding were not discussed	Sales Consultation Guideline used, exhibited good note taking skills, covered all aspects of the wedding, client did most of the talking, able to use client responses to build upon questions some of the time	Sales Consultation Guideline used, exhibited great note taking skills and used client's answers to build upon questions, bride did the majority of the talking	
Presenting XXX	Presentation was choppy and hard to follow, missed major selling points	Most important key selling points covered, presentation was smooth	All key selling points covered, XXX was presented enthusiastically, PC able to highlight areas bride stated was important to her and link them to features of XXX	
Review Albums and Portfolios	Did not show all albums, skipped key distinguishing features of albums, unable to use proper terminology to describe album features, unable to bring insight into pictures in portfolio	Able to use correct terminology to describe album features most of the time, able to highlight some aspects of photos shown in the portfolio	Used correct terminology to describe album features, able to provide insight into the majority of the photos shown in portfolio	
Present Packages	Incorrectly described packages and components, appeared un-knowledgeable about packages	Presented packages correctly with aid of marketing collateral, did not make a recommendation on package	Presented packages correctly without aids, able to lead with a recommendation on a package based on info shared by client	
Overcome Objections	Did not address client concerns, unable to provide appropriate response to objection	Addressed client concerns adequately to continue with meeting but objection may re-surface, unable to provide alternative answers to satisfy client concerns if unsuccessful at overcoming objection first time around	Successfully overcame objections, able to provide alternative answers to satisfy client concern, linked features to benefits when overcoming objection	
Closing the Sale	Did not ask for the sale, did not set up next steps as appropriate	Attempted to ask for the sale, if push back given did not pursue, next steps determined	Asked for the sale confidently, if push back given attempted to overcome objection, next steps determined as appropriate	

Scoring:
0 – 4 Poor
5 – 8 Good
9 – 14 Excellent

Goals:

1) ____
____

2) ____
____

3) ____
____

Participants found using the checklist a helpful tool for evaluating the meeting but found that some steps could be clearer. There were times when they were not quite sure what rating I should fall into. This was especially true during Overcoming objections. Some objections they felt I was able to overcome well but not others. In instances like this, they were not sure where to rank me.

Homework: Give PC self assessment questions for homework. Tell them to review materials presented during the day to prep them for the final assessment role-play on day 2

Recap: Review self assessment questions and administer quiz on packages to test for understanding (quiz will be written but trainer can administer orally if desired). Review results and answer any lingering questions that PC has from material presented on the previous day.

Final Assessment: PC will conduct a full meeting role-play to see how well they have integrated the material taught. The meeting checklist rubric will be used to evaluate this segment of training. After the role-play, trainer will give feedback to the PC and debrief him/her on results. Based on the results, Trainer and PC will decide what development goals the PC will work on with their manager for the next month or until re-evaluation time.

During the final role-play, learners all scored above 10 using the rubric. I took them through setting up personal goals for continued development. Because these learners are all current employees, a large part of the wrap up time was spent discussing how this training compared to their start up training experience.

Pros:

- -More systematic way of training on sales
- -Each step was more clear
- -Liked the exercises and worksheets
- -Much more interactive than the training they attended
- -Liked the fact that I modeled the meeting for them before they had to do the role-play
- -Having pre-work with allow the meeting time to be more productive

Cons:

- -May not have enough time to learn packages before this portion of training, how effective will PCs be at step 5?
- -Need to re-do rubric, not clear enough
- -In large groups, the final role-play will take a really long time, will there be alternative methods for evaluating performance?
- -Handbook is confusing, has a lot of info that's not needed during training