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Guideline for ISD Assessment & Instructional Approach Plan

A. Pilot Subjects

I will be conducting the pilot with 3 individuals. AA is a member of our inside sales team. This person is relatively new in the position and has had some sales experience prior to joining the company. The second person NT is a member of my team who is an Account Manager. She has almost no sales experience. The third person AP is a newer salesperson who has gone through our current start up training. She has a bit of sales experience as well but is struggling currently and we felt it would be a good refresher. Due to the timing of this exercise, there are no new hires I can practice on.

B. Implementing Context

The training session will take place next week in our offices. There will be no technology necessary for this session and handouts/manuals will be provided for them. The current sales handbook will be used as our primary reference guide. This handbook is slated to be revised but will not be completed during the time this course is running.

C. Learning Objectives/Instructional Goals/Desired Results

I will be focusing on a portion of the start up training as it relates to conducting a client meeting and closing the sale. Company history, administrative tasks and sales goals will not be discussed.

Intended Learning Outcomes/Instructional Goals

- Learners will be able to conduct a client meeting following the 7 steps of a model meeting and score a minimum of 70% on the meeting observation checklist.
- Learners will be able to overcome the most commonly given objections
- Using a consultative approach, learners will be able to recommend the best package for a bride by linking features to benefits
- Learners will be able to describe the primary differentiating features of each package
- Using the Consultation Guidelines, learners will be able to ask questions to gather information on a bride's wedding day and understand their unique needs

D. Assessment Tasks

- **<u>Review of pre-training exercises</u>**: Towards the beginning of the session, the trainer will review the Learner's pre-training exercises to probe for current knowledge and understanding of material. Pre- training exercise will include:
    - Read background and history of the company
    - Review and be familiar with the basic meeting outline
    - Review and be familiar with the names and components of each package

- Complete the Pre- Training questions:
  - ➔ What brought you to our company?
  - ➔ What excites you most about being a photography consultant?

The pre-training exercises serve several functions. First, they introduce the learner to the objectives and it sets the stage for the in person training while testing for prior knowledge. Secondly, reviewing the exercises will give the trainer a good idea of where the learner stands and if he/she will need to adjust pace or content to adjust to the learner. Lastly, the pre-training exercises allow the training session to focus time on skill building vs. information sharing (history of company, etc) while still passing on essential information.

- **Constructed Answer Items:** Given a case study of different client profiles, the learner will be asked what package he/she would recommend to the bride. The case study will be written but the answers will be given verbally by the learner. Learner must identify the recommended package/s best suited for the client and iterate to the trainer why it was chosen.

  This exercise tests the learner's ability to synthesize various pieces of information including product/package knowledge and problem solving ability.
- **Recall Items**: Administer a quiz to test for knowledge of packages (names of package, price and major distinguishing factors). This will be a written quiz given at the end of the first day.
- **Simulations:** The final test of knowledge will culminate in a role-play. The learner will conduct a full meeting with the trainer playing the role of the bride. The trainer will evaluate the learner using the meeting observation checklist as the rubric for grading.

  The role play will be the primary assessment item used and will provide the trainer with the best understanding of how much the learner has absorbed and where their skill level is at. The role-play results will help the trainer make recommendations for continued training post start up training.
- **Informal Checks for Understanding**: Leading questions will be written for the trainer throughout the training manual to test for understanding.
- **Self Assessment:** A brief self assessment will be given to the learner at the end of day 1 as homework. The 2 questions learners will answer are:
  - ➔ Which step(s) in the model meeting are you most comfortable with at this point?
  - ➔ Which steps are challenging

The self assessment serves as a way for the learner to reflect on the days activities and will also provide feedback to the trainer at the beginning of the *next day's session. The answers provided will guide the trainer to review any necessary material the learner is still struggling with.*

D. Instructional Strategies

This segment is part of a 2 day start up training and makes up the largest and most important portion of the overall session. The learning will occur sequentially and follow the same timeline as an actual client meeting. There are items I have left out of this timeline simply b/c it will already have occurred prior this segment (welcome, reviewing agenda, company history, etc).

The Hook/WIIFM: Trainer will begin by review the pre-training questions to gain insight into what motivates the learner. After a brief discussion, trainer will describe the positive benefits of completing a sale. The benefits will be positioned around the 4 main motivating factors that people have (money, having a positive impact, be a part of a growing organization, personal development). Benefits shared will include:

a. More closes mean a higher commission check
b. The opportunity to work with more brides to and be a part of a life changing experience for them
c. Helping grow our company and giving more opportunities to local photographers
d. Building personal sales skills and how they can use these skills in their career path and personal lives

Based on the pre-training question discussion, the trainer will be able to link which motivating factor is most pertinent to the learner.

YCDI: Trainer will link key selling skills to aspects of the learner's life where they may already be using these skills. Primary skills touched upon will be: persuasion, describing, listening and overcoming objections. The trainer will ask the learner to recall a time when they had to convince a friend or a family member to either so something they did not want to do (go to dinner with them, take a trip, see a movie, etc). After the learner tells the story, the trainer will highlight how they "sold" their friend on it using classic sales techniques. If learner(s) are unable to recall any situation, trainer will use a pre-prepared story of their own and ask learner to pick out key sales elements used. Trainer will then explain that most people have natural selling abilities even though they may not recognize them as such.

Review Relevant Prior Knowledge: Trainer will follow YCDI with a brief discussion of the readings given as part of the pre-training exercise. Questions asked will include:

- 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?

Direct Instruction: Trainer will introduce the concept of consultative selling and the difference between that and product based selling. Trainer will link the 7 steps of the model meeting to the 4 step of the consultative process.

Build Rapport

1) Introduction

Understand the Need

2) Probe and Connect
3) Present Company
4) Review Portfolios and Albums

Make the Recommendation

5) Present Packages
6) Address/Overcome Concerns and Objections

Close the Sale

7) Closing the Sale

After reviewing how the 7 steps link to the consultative process, trainer will deep dive into each segment.

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
2) Probe and Connect: Trainer will review the Sales Consultation Guidelines (list of questions the consultant will use to conduct the needs assessment of the client). Trainer will also tell the learner what type of information they must gather by the end of this segment in order to make a proper recommendation. During this section, trainer will ask the learner why certain questions are important to ask.
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.
4) Review Portfolios and Albums: Trainer will describe the collateral available for client viewing and tell learner why each tool is used
   i. Portfolio: 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. Albums: To show clients what is available to them
5) Present Packages: 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.
6) Address/Overcome Concerns and Objections: Trainer and Learner will complete the "Common Objections" worksheet together and discuss how to best overcome objections.
7) Closing the Sale: Trainer will describe successful closing tips and will review the sample closing scripts with the learner.

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 learner where the trainer plays the consultant and the learner plays the client. Learner will evaluate the trainer using the meeting checklist. After the exercise, trainer and learner will de-brief on the role-play.

Homework: Give learner 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

***** END OF DAY 1*****

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 learner has from material presented on the previous day.

Final Assessment: Learner 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 learner and debrief him/her on results. Based on the results, Trainer and Learner will decide what development goals the learner will work on with their manager for the next month or until re-evaluation time.