PRICELESS
GETAWAYS

7 Steps of a Sale

Facilitator's Guide

Contents

Course Details

Length/Timing	7 hours & 1 Hour Lunch
Delivery Method	Instructor-Led PowerPoint

Course Overview (or Expectations)

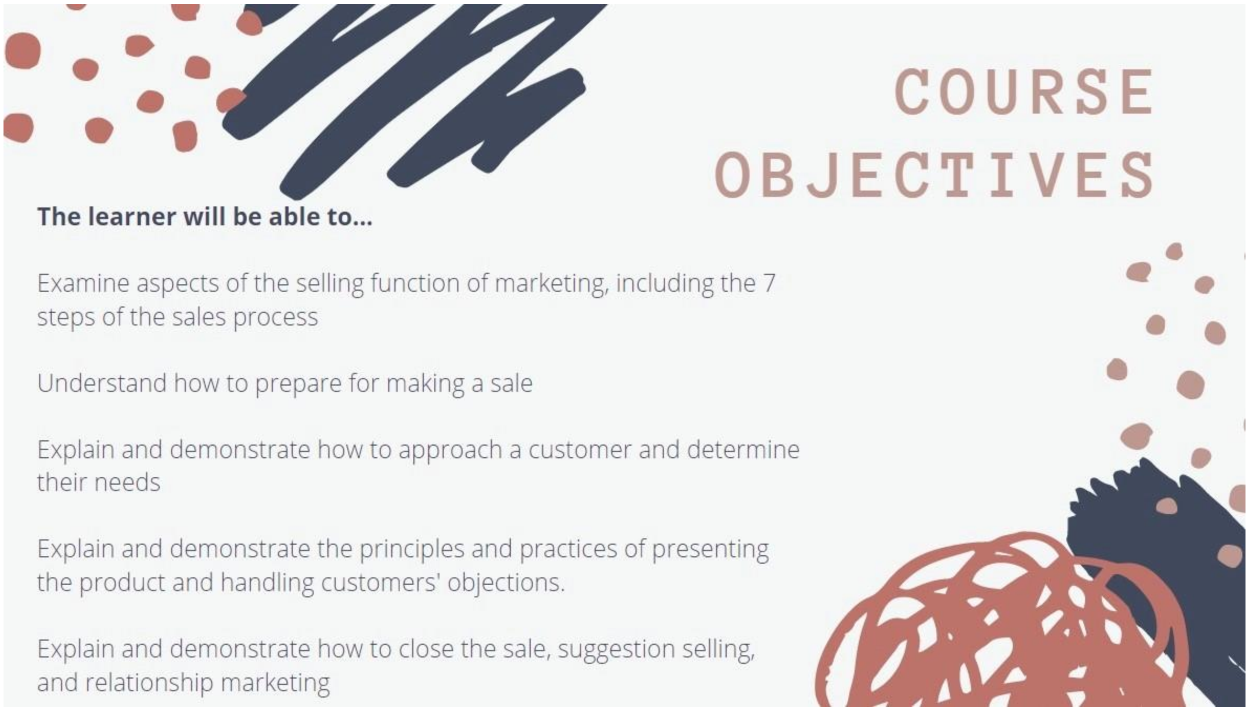
Slide #3 **Timing: 4 minutes**

Introduce yourself. Describe how the course is expected to last 7 hours, with a 1-hour lunch, and that the content is meant for both new and existing travel agents of Priceless Getaways. The main goal of this course is being able to understand the seven steps of the sales process so agents are able to get more bookings from the client.

Go over how participants are meant to participate [raise their hands] and general etiquette expectations. Outline any breaks and where they can find the restrooms and vending machines.

Course Objectives

Slide #4 Timing: 2 minutes



SAY	DO
Let us talk about what you can expect to take away from this course. Take a moment to review the course objectives; we will take a deeper look at the course topics in just a moment.	Give learners a minute to read over objectives, and then say them aloud.

Agenda & Introductions

Slide #5 **Timing: 5 minutes**

SAY	DO
Before we jump into our focuses for today, *what are you looking to get out of this course? Is there anything you are hoping we cover?* Here are our topics for today. We will start with a quick overview of prospecting customers. We will then move on to the first steps of a sale, The Approach and Determining Needs. Next, we will cover how to properly present the product to the customer and overcome any objections the customer may have that will prevent them from purchasing. We will then	Take student responses. Call on learners individually or ask participants to post responses using the chat feature in the Lino app.

look at how to perform suggestion selling and closing the sale. We will wrap up with talking about building lasting relationships with your customers to keep them coming back. As I am going through the slides, please utilize the note-taking guides, graphic organizers, and the many other resources in your workbook. These resources are there to provide you with space to take notes. Also, utilize the Lino app, which you were told to download prior to the course, to ask any questions. At the end of each module, I will go through and answer the questions posted via the app.	

TIP:

Have learners download the Lino app, prior to the start of the course or have it downloaded and saved as a desktop icon on each computer. This will ensure you do not run into many technology issues during the training session.

Module 1 – The Approach

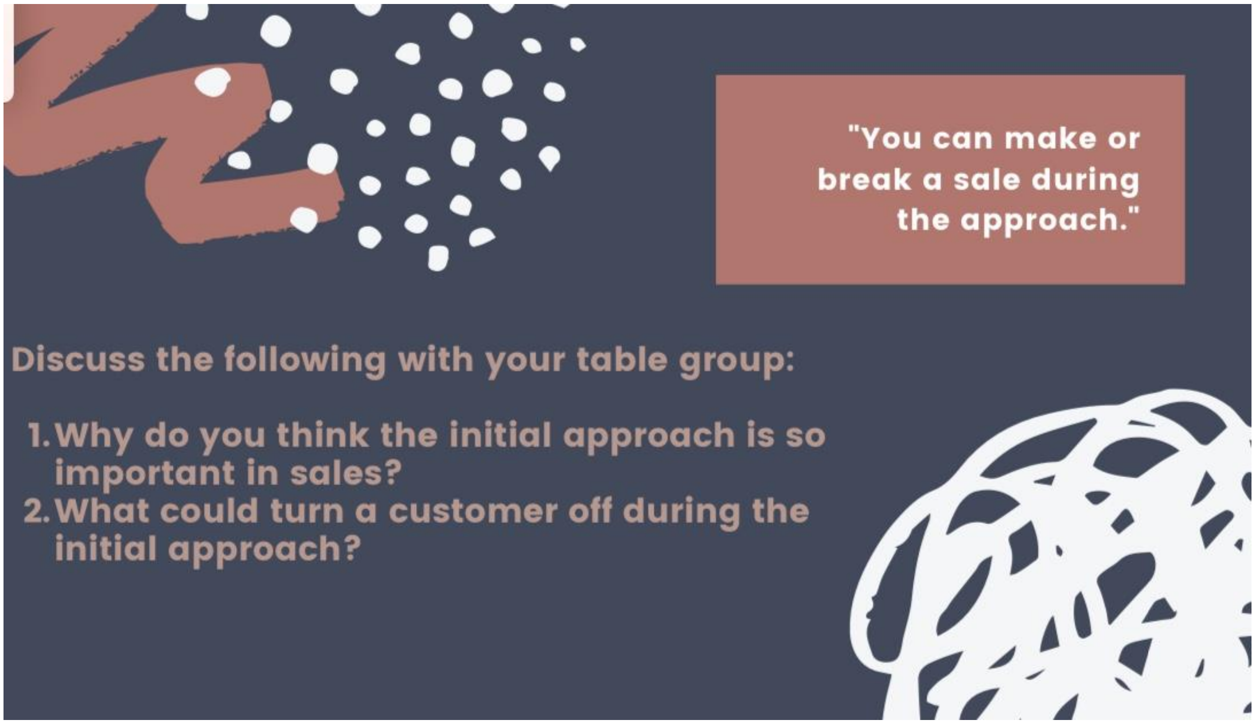
Slide #6 **Timing: 1 minute**

SAY	DO
During this module, we will be demonstrating how to successfully approach a customer to open a sale and list three retail approach methods you can use on your customers. Before we begin, let us discuss the sales approach as you currently know and see it.	

TIP

Some learners will be familiar with the approach methods, and some may not be. It is important to make sure you group learners with different skill levels together, so they can learn from each other, both experienced and non-experienced.

Slide #7 Timing: 10 minutes

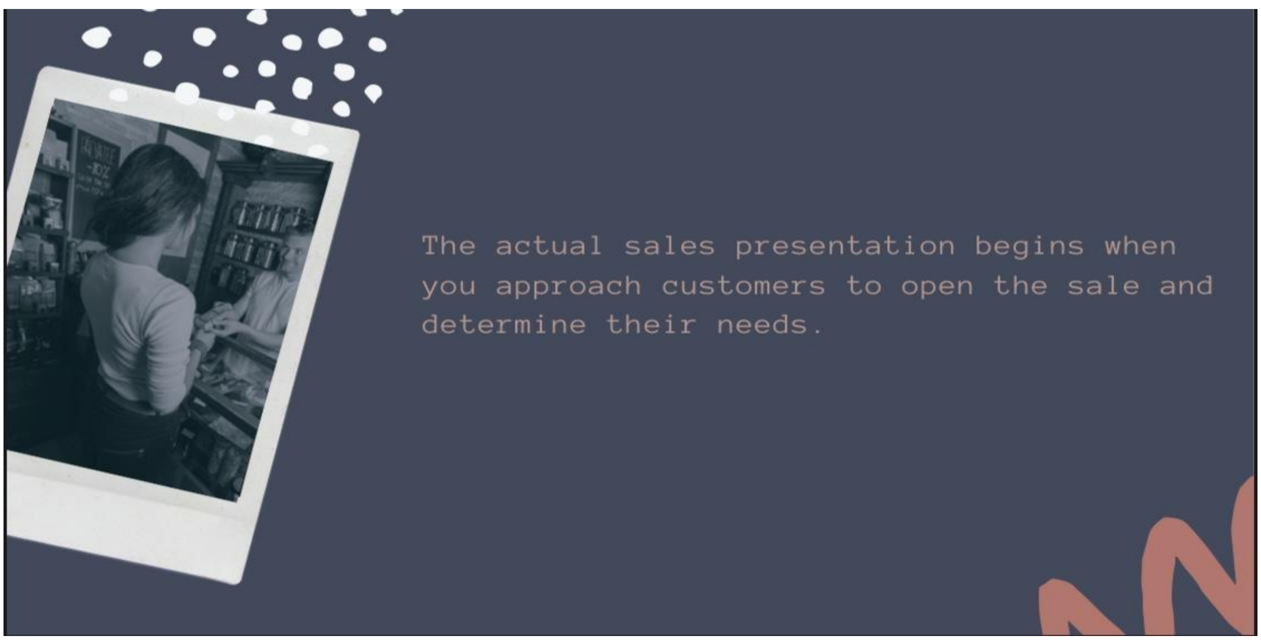


SAY	DO
Internalize the following quote, as I read it aloud: "You can make or break a sale during the approach." With your table groups, you are to discuss the following two questions: 1. Why do you think the initial approach is so important in sales? And 2. What could turn a customer off during the initial approach? I want you to take a few minutes to discuss these questions with your table group, and then we will share some group responses with the class. Okay, now that you have discussed these	Take student responses. Call on learners individually.

two questions with your table partner, give me two volunteers (by show of hands) that are willing to share their table discussion with the class. Those were some really great responses. The initial approach sets the tone and begins the communication between the salesperson and the customer. It is the first step in establishing rapport with the customer. A salesperson who has a weak greeting or who does not make eye contact, and a salesperson who is not properly groomed, has bad breath, and is too aggressive are all reasons a customer would be turned off during the initial approach.	

Slide #8

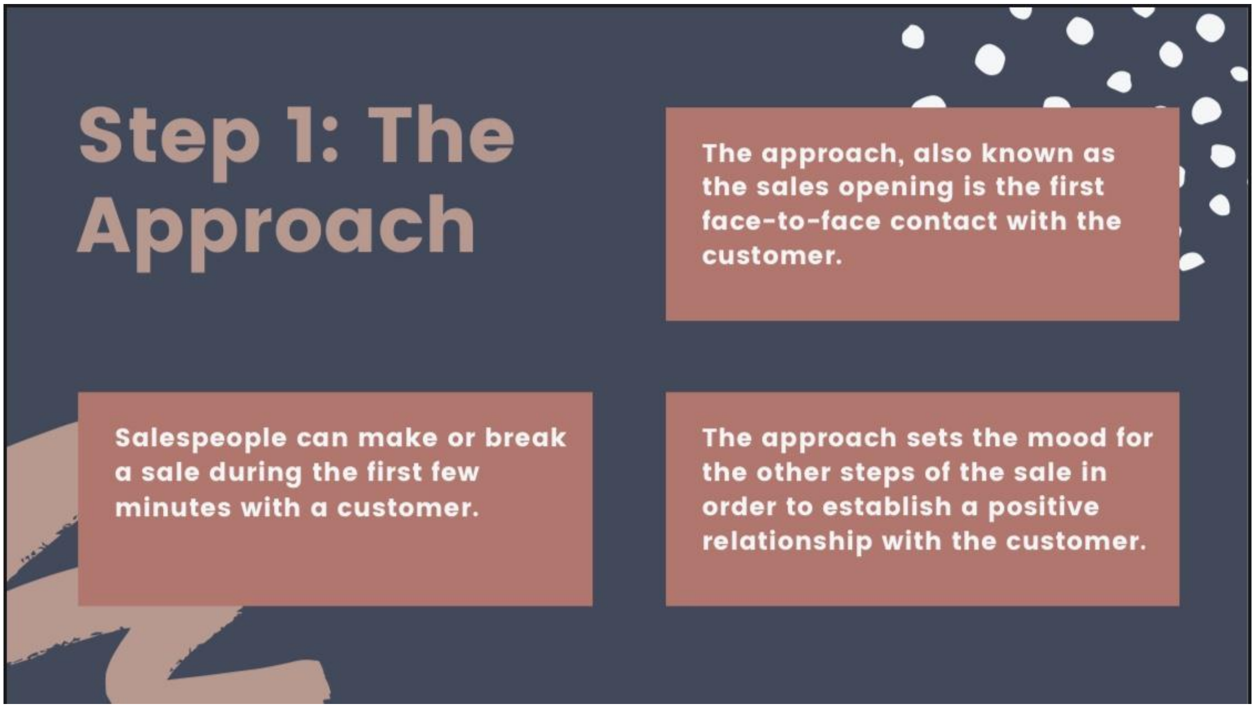
Timing: <1 minute



SAY	DO
The actual sales presentation begins	

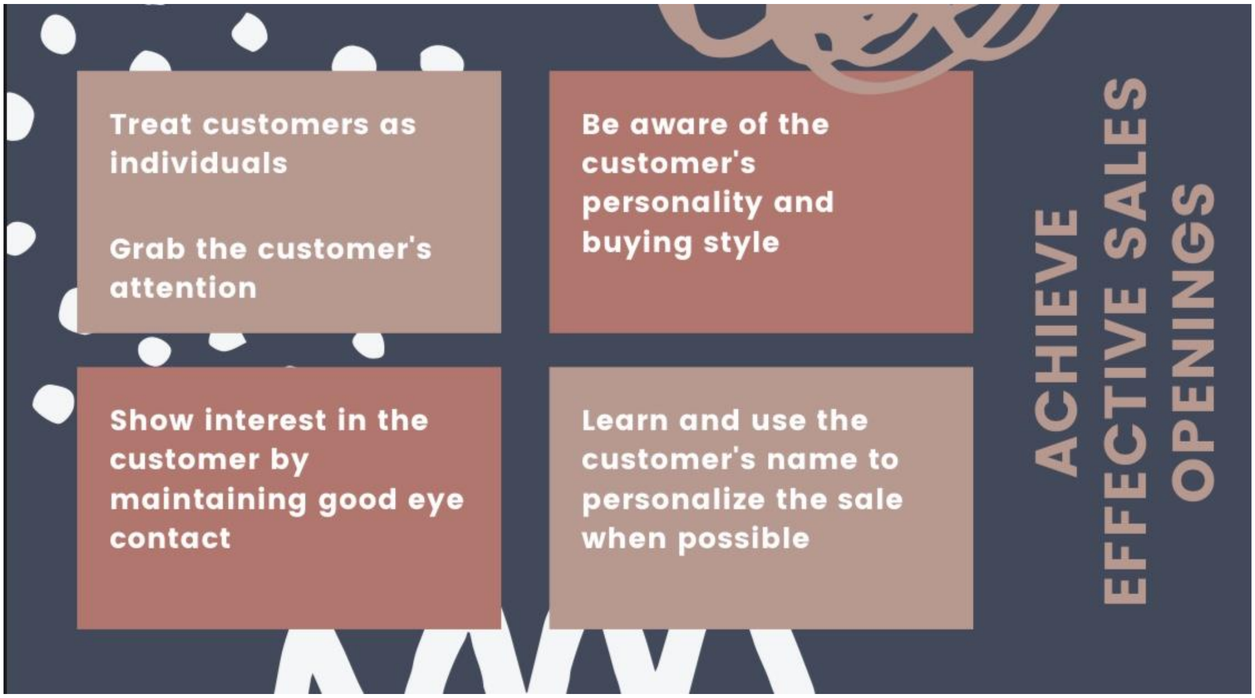
when you approach customers to open the sale and determine their needs.	

Slide #9 **Timing: 1 minute**



SAY	DO
Step 1 in the sales process, the approach, also known as the sales opening, is the first face-to-face contact with the customer. Salespeople can make or break a sale during their first few minutes with a customer. They must learn how to properly approach a customer to open a sale. The approach sets the mood for the other steps of the sale. Its purpose is to establish rapport with the customer.	

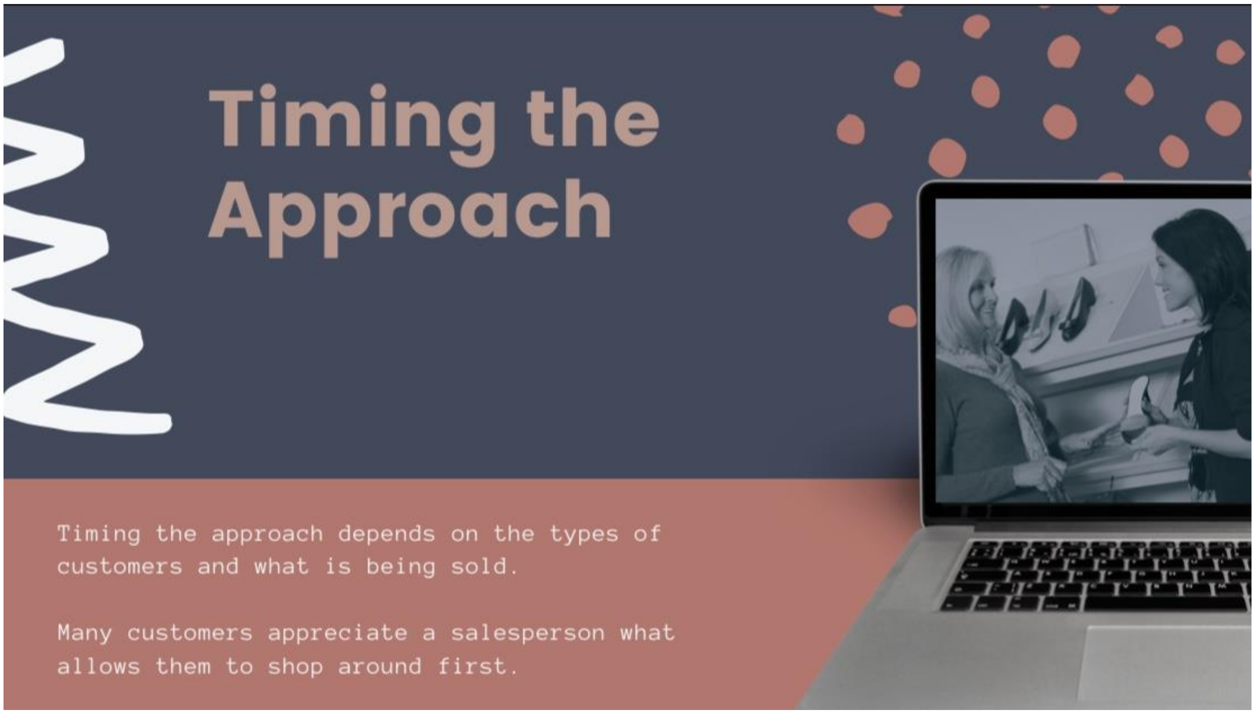
Slide #10 Timing: 2 minutes



SAY	DO
In order to achieve an effective sales opening, salespeople must remember to do the following: 1. Treat customers as individuals. Never stereotype a person because of age, sex, race, religion, appearance, or any other characteristics. 2. Be aware of the customer's personality and buying style. Some customers like to do business quickly. Others prefer a methodical pace. 3. Show interest in the customer by maintaining good eye contact and showing friendliness. 4. Learn and use the customer's name to personalize the sale when possible.	

5. Grab the customer's attention, incorporate a theme in the approach that is related to do the presentation and the customer's buying motives.	

Slide #11 **Timing: 1 minute**



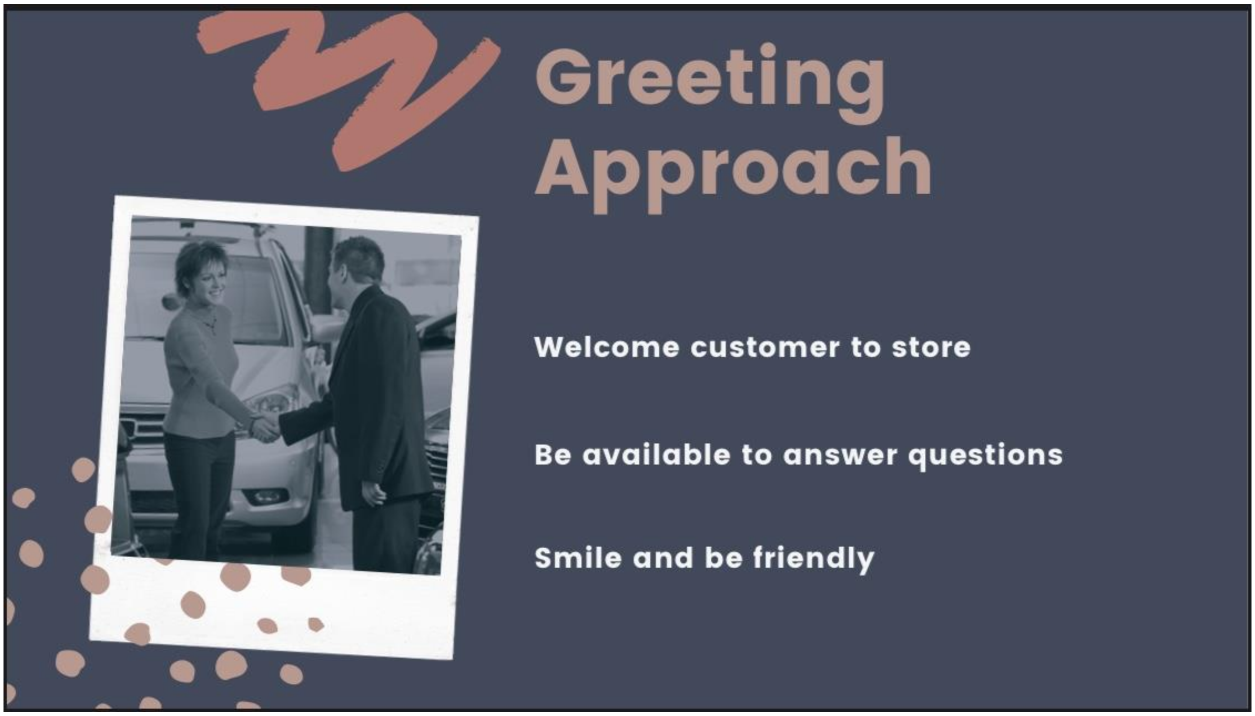
SAY	DO
Timing the approach depends on the types of customers and on the products being sold. When customers are in an obvious hurry, you should approach them quickly. When customers seem undecided, it is best to let them look around before making the approach. Many customers prefer to shop around before buying. They appreciate salespeople who show interest while allowing them to make their own decisions. These casual lookers will seek	

help when they need it.	

Slide #12 Timing: <1 minute

SAY	DO
There are three methods to use for the initial approach. Those methods are: greeting, service, and merchandise or theme. You must evaluate the selling situation and they type of customer to determine which method is best. In some cases, you may use one, two, or all three approaches as part of your sales opening. Next, we will discuss and gain a better understanding of each approach method.	

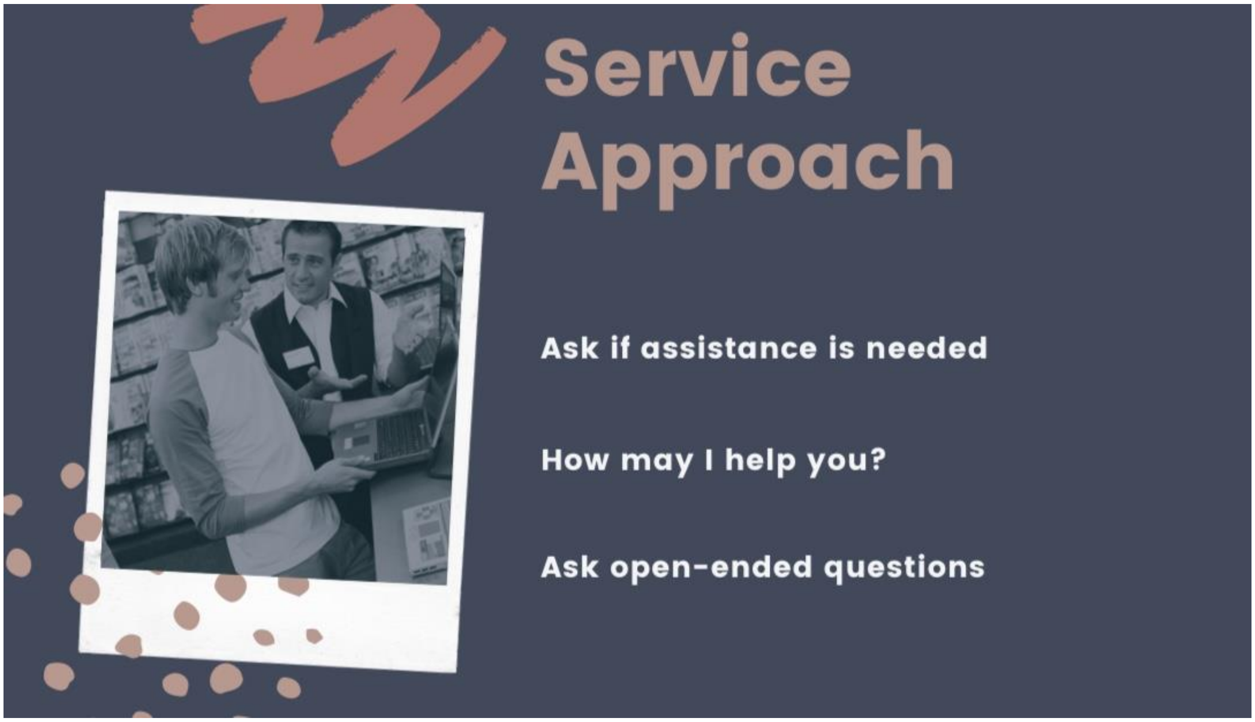
Slide #13 Timing: 5 minutes



SAY	DO
The first method a salesperson can use to approach the customer is called the greeting approach. I need one volunteer to come to the front to assist me with demonstrating the greeting approach to the group. Thank you for volunteering (learner's name). With the greeting approach, the salesperson welcomes the customer to the store. This lets the customer know that the salesperson is available for assistance. For example, simply greeting a customer with "Good morning." If a frequent customer arrives, using the customer's name in the approach makes	Select a learner in the group, and bring them to the front of the classroom. Demonstrate with the learner, for the class, the different methods to approach a customer using the greeting method. Act out each as you move along in the "Say" section, so the learners have a visual of how this process looks.

the customer feel important. When you greet the customer, it is important to use a rising tone in your voice. Regardless of whether the customer responds in a friendly manner, it is extremely important for the salesperson to smile and continue to be friendly. After greeting the customer, pause for a few seconds. Out of courtesy, most customers will respond. If they need hep, they will tell you how you can assist them. If they are just looking, they will let you know. The greeting approach establishes a positive atmosphere and opens the lines of communication. It can also be incorporated easily into the other two retail approach methods. Thank you (learner's name) for volunteering. You can have a seat. Can I get another volunteer?	

Slide #14 Timing: 5 minutes



SAY	DO
Thank you for volunteering (learner's name). Next, we will be discussing and demonstrating the service approach method. With the service approach, salespeople ask customers if they need assistance. One way to use this method is to ask, "How may I help you?" An open-ended question such as this one offers the customer a greater opportunity to response with more than "yes" or "no." The wrong way to use the service approach is to ask, "May I help you?" This question is ineffective because customers will often say, "No, thank you,	Select a learner in the group, and bring them to the front of the classroom. Demonstrate with the learner, for the class, the different methods to approach a customer using the service method. Act out each as you move along in the "Say" section, so the learners have a visual of how this process looks.

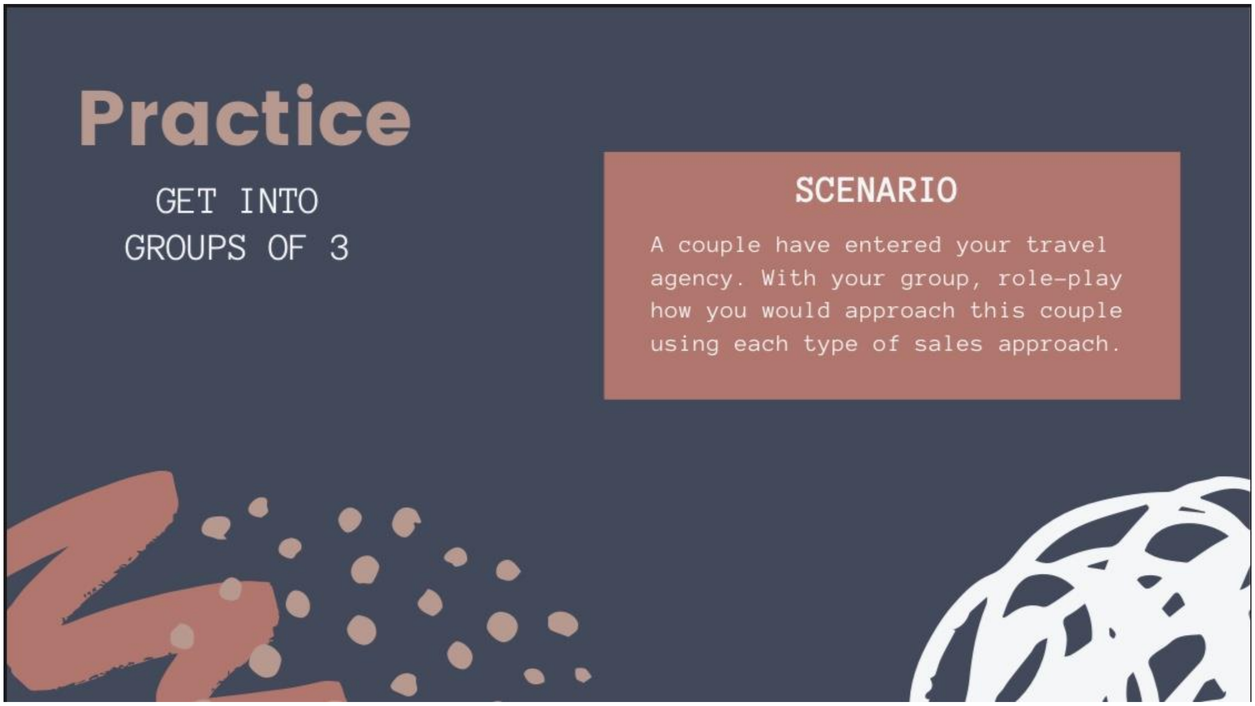
I am just looking." That customer response ends communication between the customer and salesperson. Thank you (learner's name) for volunteering. You can have a seat. Can I get another volunteer?	

Slide #15 **Timing: 5 minutes**

SAY	**DO**
Thank you for volunteering (learner's name). The last approach method, we will be discussing and demonstrating, is the merchandise/theme approach method. With the merchandise/theme approach, the salesperson makes a comment or asks questions about a product in which	Select a learner in the group, and bring them to the front of the classroom. Demonstrate with the learner, for the class, the different methods to approach a customer using the merchandise/theme approach method. Act out each as you move along in the "Say" section, so the learners have a visual of how this process looks.

the customer shows an interest. You may say something about the product's features and benefits or typical customer buying motives. It should give the customer some information that is not immediately apparent to the eye. Focus the conversation on the customer's interest. With a jacket, you might say, "That children's jacket comes in several other colors." If you have no indication of the exact interest, you can talk about the item's popularity, its unusual features, or its special values. You can also as a question, such as "Is that the size you need?" or "Were you looking for a comfortable children's jacket?" This themed approach is effective because it focuses attention on the product and the sales presentation. It increases customer interest and could encourage a purchase. In addition, customers may not see the desired style, size, or color on the selling floor. The merchandise approach lets the customer who what is available. Thank you (learner's name) for volunteering. You can have a seat.	

Slide #16 | Timing: 17 minutes



SAY	DO
So now that we properly know how to greet a customer using the greeting, service, and merchandise approaches, it is time to role-play. Each table has three learners, and each table is considered a group. Your instructions are: You will be given a scenario and your table group are to role-play/act out how the scenario plays out using the different approach methods. Your scenario: A couple have entered your travel agency. With your group, role-play how you would approach this couple using each type of sales approach.	Make sure the website window with the timer is active in the background so you do not have to locate it during the training. Show the slide and read over the scenario. Explain to the learners what your expectations are from this activity. Once everyone has an understanding, bring the timer window to the forefront of the screen and begin the timer. Walk around the room observing each group, answer questions, and offer recommendations if you see a group struggling. If you see that a group is off task, have them do their demonstrations while you

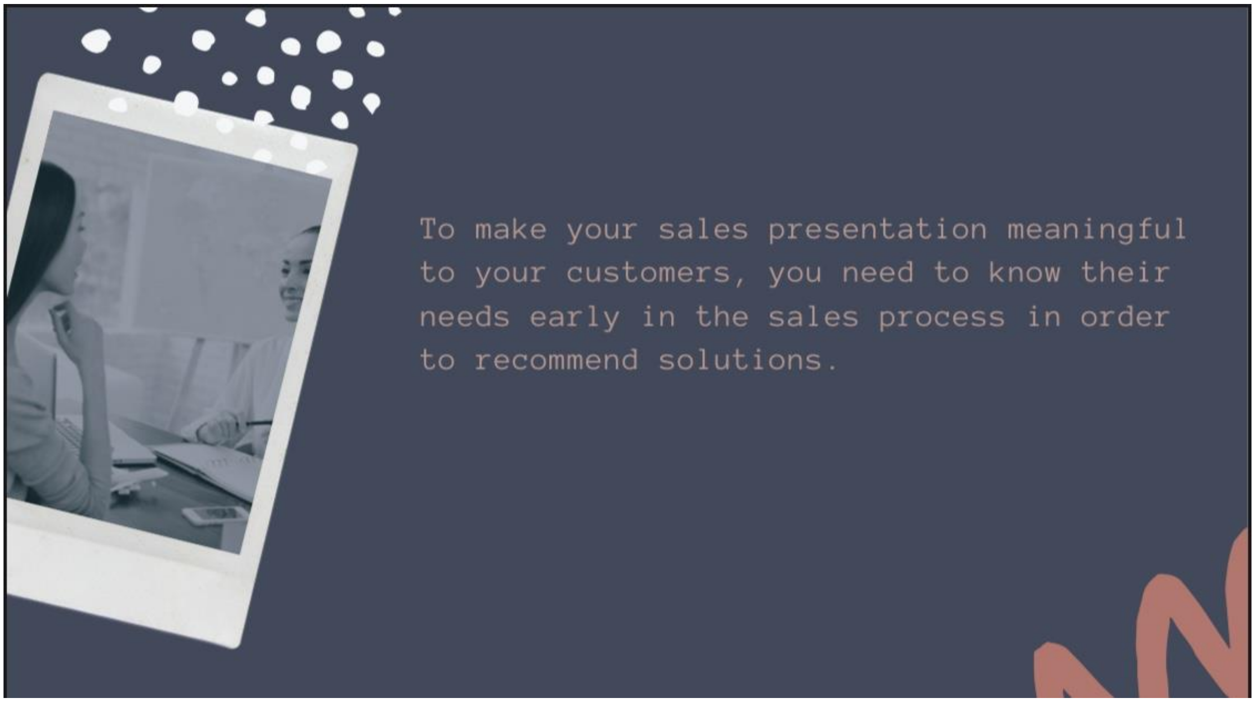
You have 15 minutes to act each of the three approaches. For each approach, a different person in the group must play the role of the salesperson. This ensures each group member has a chance to practice a greeting approach. When you are playing the customer, make it as realistic as possible to try and challenge your salesperson to keep going until they have used the correct approach. There is a timer on the board, once the alarm sounds, your time is up, and everyone should go back to their seats quickly. I will walk around observing, providing feedback and answering any questions you may have. You time starts now! (15 minutes later the timer goes off) Alright learners, lets go back to our seats. As I walked around, I observed each group, and you all have this approach method down packed. Now that we have gotten the customer's attention by approaching them, let's now figure out how to determine their needs.	stand there to watch. Once the timer goes off, minimize that website window, and bring the PowerPoint back up in presentation mode.

Module 2 – Determining Needs

Slide #17 **Timing: 1 minute**

SAY	DO
During this module, we will discuss when and how to determine customer needs. Before we begin, let us discuss determining a customer's needs as you currently know and see it.	

Slide #18 Timing: 2 minutes



SAY	DO
To make your sales presentation meaningful to your customers, you need to know their needs early in the sales process. This step in the sales process is important because it is the foundation of the marketing concept, which stresses the importance of satisfying customer's needs and wants. It is the salesperson's job to uncover their customers' problems or reasons for wanting to buy. In some instances, their motives or needs may be quite obvious, but that is not always the case. It is your job to determine those needs so you can offer one or more solutions. The solutions will come from the features and benefits of your product or company policies.	

Slide #19 Timing: 1 minute

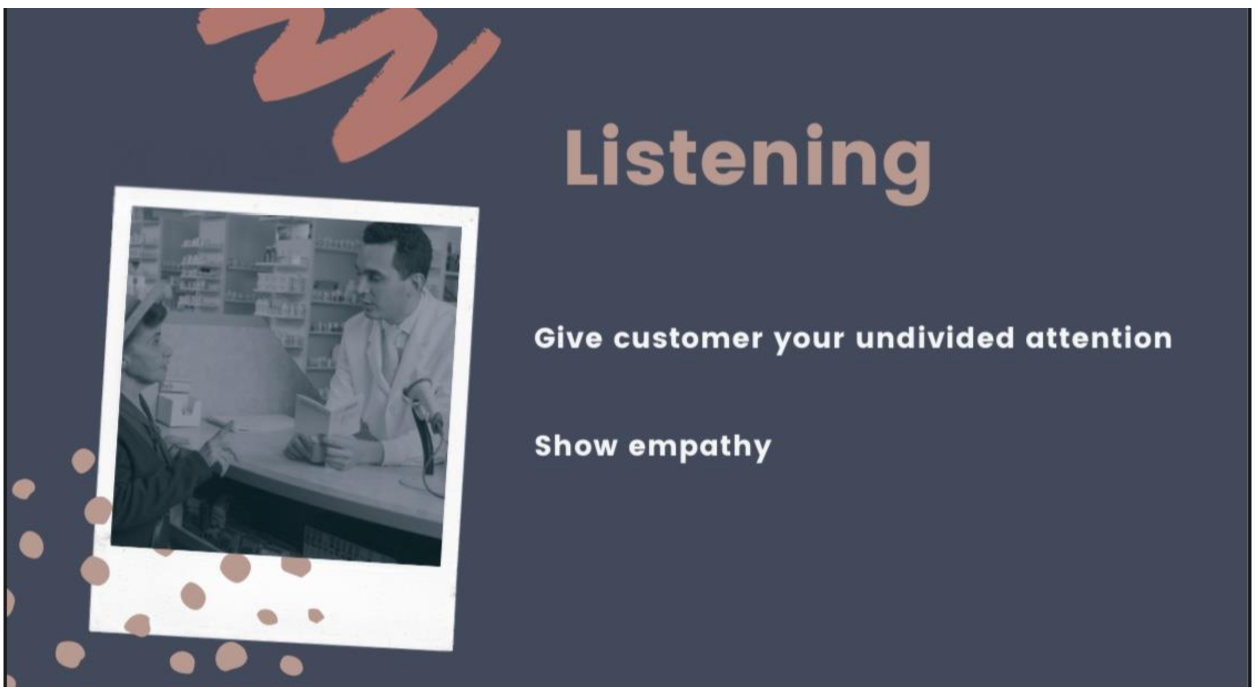
SAY	DO
To be an effective salesperson, you need to be astute in determining customer's needs and wants. Three methods that will help you become astute in determining customers' needs are observing, listening, and questioning. Each technique provides the salesperson with necessary information during the entire sales process. Thus, they are used in conjunction with one another.	

Slide #20 Timing: 2 minutes

SAY	DO
The first technique you can use to determine a customer's need is observing. Seasoned salespeople learn to read their customers by observing them. Nonverbal communication is key when observing. Facial expressions, hand motions, eye movement, and other forms of nonverbal communication can give you clues about a customer's interest in a product. For example, the length of time a customer looks at or handles a product in a store can give you an initial idea about their level of interest in the product. How long a customer holds the product during a sales presentation can indicate how strongly he or she feels about the product. At the other end of the spectrum, a raised eyebrow or frown may communicate dislike for a product's	While mentioning the different facial expressions, demonstrate how each facial expression looks so the learner is engaged with a visual demonstration.

feature. The key to observing it the proper selection of facts. You want only those facts that are important to the sales process. Avoid stereotyping people or drawing conclusions from your observations before getting additional facts. For example, a person dressed in shabby clothes may be more financially secure than someone dressed in more expensive-looking clothing.	

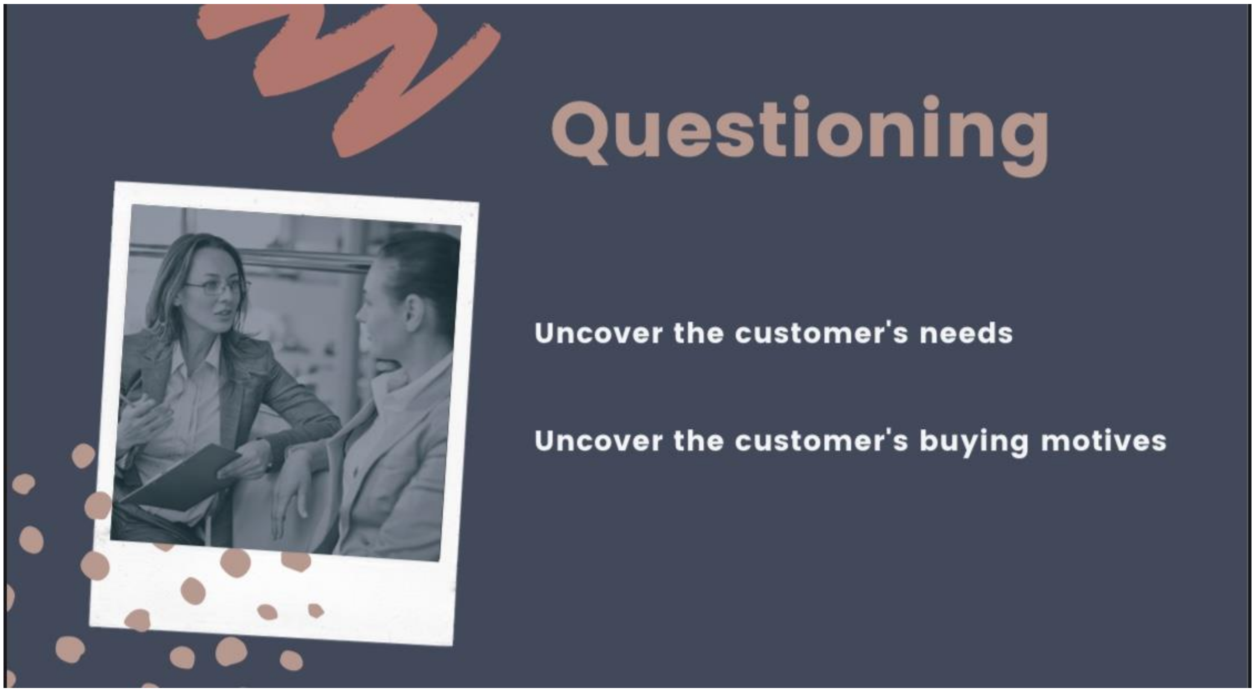
Slide #21 **Timing: 2 minutes**



SAY	DO
The next technique is listening. Listening is one of the most interpersonal skills you need to practice in selling. Giving customers your undivided attention and listening with empathy are two specific skills that will	Be sure to act out the customer's comment as if you were a true customer that felt that way about their copier.

encourage your customers to talk freely. They will feel you are truly listening. During conversations with your customers, you can pick up clues about their needs and wants. That information will be helpful for the product presentation. For example, the customer may say, "My copier is ten years old. It prints black and white copies. When I need color copies, I take my work to a copy center and pay for them. As my business grows, I find that I need color copies more and more." From these statements, you have learned that the customer is looking for a quality color copier for business use. Since the copier is for a small but growing business, upgraded and advance features may be important to this customer.	

Slide #22 Timing: 2 minutes



SAY	DO
The last technique you can use to determine a customer's need is questioning. Before you can listen to customer, you must get them talking. Once way of engaging a customer in conversation is to ask questions. Not all customers can clearly express their needs and motives when making a purchase. IN such a situation, well-chosen questions can help you uncover needs and buying motives while putting the customer at ease. When you begin determining needs, first ask general questions about the intended use of the product and any previous experience with it. Build your questions around words like who, what, when, where, how, and why. You might	While mentioning the different facial expressions, demonstrate how each facial expression looks so the learner is engaged with a visual demonstration.

ask the following questions of a prospective customer who wants to purchase a copier: 1. What type of copier are you presently using? 2. Why is that copier not meeting your needs? 3. How many copies will you be making every week or month? 4. Do you need a copier to also serve as a printer? 5. Based on those questions, you should be able to determine what a customer's needs are, and decide which three products you will present for them based on their needs.	

Slide #23 **Timing: 3 minutes**

SAY	DO

Here are some Do's and Don'ts when it comes to questioning a customer. 1. Do ask open-ended questions that encourage customers to do the talking. Open-ended questions are those that require more than a "yes" or "no" answer. For example, you could ask, "What do you dislike about the copier you're presently using?" The answer to such a question will provide valuable information about a customer's needs. 2. Do ask clarifying questions to make sure you understand the customers' needs. To do this, use opening lines such as "Let me see whether I understand what you want," or, "Am I correct in assuming that you're looking got a product that can…?" 3. Don't ask too many questions in a row. This will make the customers feel as if they are being cross-examined. Give the customer plenty of time to answer any questions you might have, and be sure to listen carefully and respond thoughtfully. A good salesperson learns how to develop a processional yet conversational manner **4.** Don't ask questions that might embarrass customers or put them on the defensive. For example, when selling skis, it is often necessary to determine the customer's weight, but a customer	While mentioning the Do's and Don'ts, verbally act out how to say each question. The learner should be aware that your tone dictates a lot in the sales process as well.

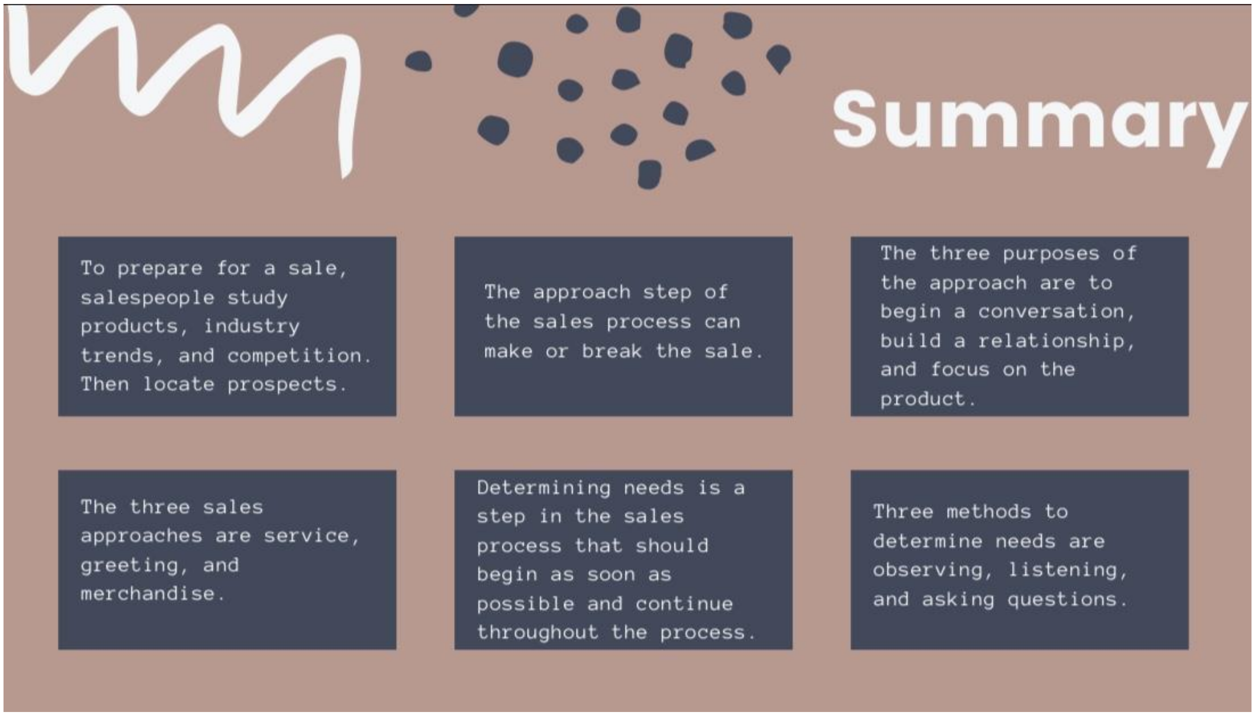
may feel uncomfortable giving this information. In such a situation, you might have the various weight categories listed. Then you can simply ask the customer which category they fall under. In this way, you avoid having to ask the person, "How much do you weigh?"	

Slide #24 **Timing: 20 minutes**

SAY	DO
So now that we properly know how to determine a customer's needs, it is time to role-play. With your table groups, you are to imagine you are a salesperson for a travel agency, specializing in all inclusive resort vacations, which can be quite	Make sure the website window with the timer is active in the background so you do not have to locate it during the training. Show the slide and read over the scenario. Explain to the learners what your expectations are from this activity.

costly. With your group, come up with at least six tactful questions to help you determine which destinations to present to a couple that has just entered your agency. The couple doesn't appear to have a lot of money, but you know as a salesperson, you can't judge a book by its cover. There is a timer on the board, once the alarm sounds, your time is up, and everyone should go back to their seats quickly. I will walk around observing, providing feedback and answering any questions you may have. You time starts now! (20 minutes later the timer goes off) Alright learners, lets go back to our seats. As I walked around, I observed each group, and you all have this determining needs method down packed.	Once everyone has an understanding, bring the timer window to the forefront of the screen and begin the timer. Walk around the room observing each group, answer questions, and offer recommendations if you see a group struggling. If you see that a group is off task, have them read their questions to you and provide you with more insight as to how they feel those questions will be affective in determining a customer's needs. Once the timer goes off, minimize that website window, and bring the PowerPoint back up in presentation mode.

Slide #25 Timing: 12 minutes



SAY	DO
So to summarize what we have learned about the 7 steps of a sale thus far. To prepare for a sale, salespeople study products, industry trends, and competition. Then locate prospects. The approach step of the sales process can make or break the sale. The three purposes of the approach are to begin a conversation, build a relationship, and focus on the product. The three sales approaches are service, greeting, and merchandise. Determining needs is a step in the sales process that should begin as soon as possible and continue throughout the process. Finally, the three methods to determine needs are observing, listening, and asking questions.	As learners raise their hands, call on them one by one, and answer any questions they may have. Also, check the Lino app for any anonymous questions to be answered.

That wraps up Module 2. Do you have any questions regarding what we have covered in the first two modules of the course? Now that we have determined a customer's needs, we must now develop an understanding of which products to present to the customer and how.	

Slide #26 **Timing: 15 minutes**

SAY	DO
But first, we will take a 15 minute break. Grab a snack, go to the restroom, make a phone call, check emails. Anything you need to do, just make sure we are back in the training room in our seats at the 15 minute mark to ensure we stay on track to finishing up on time.	After advising the group of the break, put the 15 minute timer on the board so learners receive an alert once their time is up.

Train the Trainer Tips

Educational Philosophy

As an Instructor, your role is not only to educate the client but to also build confidence and excitement about the course. Educating adult professionals poses specific challenges.

Please keep in mind the following suggestions for facilitating the learning process:

- Adults generally learn best in an atmosphere that is non-threatening and supportive of experimentation.
- Interactive teaching methods result in more meaningful learning for adults.
- New knowledge must be integrated with prior knowledge and experience.
- Adult learning is centered on problem solving and real experiences.

Training Tips

Always

- Review all materials and do all the exercises in the book before the first day of class. Students expect you to know what you are talking about, not figure it out as you go along.
- Study the test questions, if applicable, in order to make sure that the mate rial in the assessment is covered in class.
- Arrive in the physical or virtual environment one hour early on the first day of your class to ensure that everything is in order for your class. Thereafter, arrive at least thirty minutes early each day.
- Teach to the whole class instead of a few students who seem to be paying attention. Walk around the room. Look at everyone's screens to see if each student is in the right place. Let the students feel that you are there to he lp them learn.

Never

- Criticize or express any opinion regarding the client's infrastructure or software selection.
- Read directly from the book or slides. The students can read the book on their own time.
- Ignore disruptive situations. If a student is talking and you are having diffi culty concentrating on the lesson, then other students are probably having difficulty as well. You can move directly behind the talker, or you can call a

quick break and ask to speak to the student alone. Never embarrass someone in front of others.

Class Preparation

The best way to have a successful class is through class preparation. Read through ALL the instructor notes and practice what you will say so you're not tempted to read them to the class.

Learning Environment

It is necessary to test and verify the setup of every class. Be sure you have tested remote access if you will be teaching virtually. Understand the platform and how to use the tools you'll need during the class.

On the first day of class, verify the setup and equipment. Troubleshoot for possible problems and learn the environment. Problems are easier to resolve early before they snowball into a crisis.

Classroom Cleanup

Every instructor is expected to leave the classroom in a neat and orderly manner. All papers and course materials should be neatly stacked, trash should be removed from the classroom, and whiteboards should be erased.

For virtual training, please be sure to "exit the webinar" at the end of each class.