



Business ■ Performance Group

Business-to-Business Inside Telephone Sales – Program Consulting, Sales Training and Coaching

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Business-to-Business Inside Sales

Building and Growing Business Relationships Over the Phone — The Alternative to Highly Expensive Field Sales

Dramatically improve your business -to-business coverage with inside sales!

Our telephone sales technique is not telemarketing. It's really field sales without the travel expense. We teach special approaches and skills required to build relationships and sell your products, programs and services over the phone. We provide consulting and program development services to help you develop your inside sales telephone initiative from the development of the business model, to hiring and selection, to developing management key performance indicators.

Over 15 Years of Experience in Providing Inside Sales Training, Coaching and Program Consulting

Whether you're a company wanting to benefit from our network of global trainers, looking to reach far-away customers, or just trying to get control of your cost of sales, Business Performance Group is an internationally recognized business-to-business telephone sales consulting and performance improvement organization. And we can help you reach your goals.

Inside this booklet are the outlines of our consulting, training and support practice. The categories are:

Business Case

Whatever your current sales coverage model, your business will demand a rock-solid business case before implementing a new or expanded telephone sales platform. You must also build the metrics and create the business case for deployment. As you implement, this business case will provide milestones to measure progress, and to assure the business case is being met.

Getting Started

There are many details necessary to implement a telephone sales platform. You'll need to prepare territories, deploy a customer relationship management system, design the interfaces with the rest of the organization, including marketing automation, and set your metrics. You'll also need to decide on the career path of your inside salesperson. Will they move into field sales? Management? Or stay where they are? And you must also write job descriptions and call outlines, and decide on compensation. We'll help you design all the details required for a smooth launch.

Selection

Who will you hire? Not surprisingly, the ideal telephone salesperson differs from a field salesperson. They have a repetitive job without as much visual stimulation. They need to be empathetic, but not so much that they have a hard time representing your company. We have ideal profiles for inside salespeople, and we can help you select the right one based on your business case and the job design you selected in "Getting Started."

Orientation

The first 25 days (five weeks) are critical. First, you want to get your inside salespeople on the phone and producing as soon as possible. But before you do, they must be oriented to the company, including product knowledge. What product knowledge is absolutely required, what can be learned on the job, and what is the right way to teach new inside salespeople about your complicated products and services? We'll help you design an orientation program that swiftly brings your inside salespeople up to speed.

Training

Using the telephone to sell is hard. First, you're interrupting a customer's day. Second, what you say in the first 20 seconds is critical to a successful sales call. And finally, this isn't telemarketing – it's open dialogue telephone sales – the salesperson needs a clear path to follow but also have the knowledge and skill to handle each situation. We have a series of e-learning and facilitator-led training interventions designed to get your salespeople on the phone and producing revenue as soon as possible.

Managing

Managing inside salespeople is challenging – inside salespeople are typically new to your organization, your product and services and possibly to selling. They need lots of emotional nutrition. Your management team will need to be prepared and ready to deal with the challenge. We'll support you as you train your managers, and help you deploy the systems and resources necessary to support your business case.



Coaching

A good coach can raise inside sales revenue performance by over 20%. We have an inside sales coaching process we will provide, and we'll train your managers to use it. If you don't have the resources or time to coach yourself, our coaches can help, and get you that extra revenue boost.

Leading

Leadership is designing good sales meetings and contests, boosting and maintaining a high level of motivation and implementing a sales culture second to none. We'll provide the support, education and resources you need.

Building and Growing Business Relationships Over the Phone — Part of Marketing Automation

Marketing automation is a strategy of technology-created experiences for new customer acquisition, demand generation, lead creation/management and lead nurturing, aligned to buyer needs and expectations throughout the buying cycle.

Today's self-educated customer must be engaged with targeted experiences that are designed to add value at each step, driven by data, and facilitated by the seller's meaningful interactions. Timing and relevance are critical elements of this engagement, whether by marketing or sales. The content of these engagements must be tailored and aligned to the customer's business issues and how your organization's products and services can provide solutions. Customers have little desire for being bombarded with product literature they consider to be irrelevant. Customers do not want phone calls interrupting their day simply to check in or verbalize the latest new product or promotion. They do, however, want informative interactions that support their search for a solution.

Business-to-business telephone sales can be a powerful component to your marketing automation strategy through:

- **Building business relationships sufficient in breadth to allow the telephone salesperson to make product and service recommendations to the customer by serving as an advocating consultant.** *We can help you build meaningful relationships over the phone.*
- **Delivering targeted interactions triggered and customized by data from the buyer's online interactions and marketing's communications.** *We can help you design call outlines customized to the buyer's self-educating experiences and your marketing outreach.*
- **Providing human contact to what otherwise might be a solely online relationship.** *We can help you develop meaningful contacts designed to put the buyer first.*
- **Taking advantage of inbound calls.** *When a potential customer calls, they are interested and engaged, we can help you maximize the inbound interaction.*
- **Profiling aggressively.** *The telephone conversation provides a great opportunity to further profile the customer, adding to the digital profile established online. We can help your telephone salespeople uncover the customer's nuanced buying criteria for further segmentation.*
- **Developing analytics.** *We can help you develop tracking to increase market intelligence.*
- **Engaging at the right time.** *We can help you develop a lead nurturing program and planned annual rate of call (PAR) triggered by customer knowledge and events.*
- **Activating social media.** *We can help train your telephone salespeople to engage meaningfully with customers via social media if assigned to sales.*
- **Campaigning effectively.** *We can help you design the telephone sales components of campaigns targeted to generate sales from a selected database of customers.*



- **Reducing incomplete, inaccurate or insufficient customer information.** *We can train your telephone salespeople to upgrade customer information profiles on each call.*
- **Compensating correctly.** *What is the salesperson's contribution to an integrated campaign consisting of website, e-mail and other marketing communications? We can help you design a compensation plan that rewards the targeted efforts of the sales group.*
- **Eliminating silos.** *We can help you knock down the silos between marketing and sales that dampen your demand-generation initiatives.*

Business Intelligence

One of the side benefits of face-to-face selling is access to the customer's body language. But capturing this silent communication is often prohibitively expensive, and in today's environment of protected work establishments, sometimes impossible to obtain. Your customer's online behavior provides behavioral clues beyond the guesswork of body language by documenting what the customer considered important, and what they reacted to positively. Telephone sales can be a cost-effective and integral part of your marketing automation effort. We can teach your telephone salespeople to critically learn from the customer's online behavior.

Business Case

A key to building a successful inside sales initiative is having a great business model that provides a positive return on investment. Revenue generators like inside salespeople must pay for their positions and generate a positive return for the business. By studying your account base and customer behavior, a model of expected revenue gains can be generated. Building the salary and sales overhead structure covers the expense expectations.

In the same way, other sales channels your organization uses can be modeled. Inside sales must fit into the overall marketing plan of the business and produce a net improvement in overall business performance. In many businesses, the top customers in terms of revenue are visited by field salespeople. The middle-group customers are called by the inside sales team. And marketing takes the bottom tier.

When the business model is complete, it contains both activity goals and revenue targets for the inside sales team. Activity goals can be measured every day to ensure the plan is met and that assumptions are correct. These goals include the number of completed calls, talk time and other key performance indicators. Revenue targets can be monitored monthly and quarterly.

Our consultants will work with you to create a business model for your organization. Deliverables include:

Business Case Process

A description of the process to develop your business case, including financial and coverage information required.

Inside Sales Representative Cost-of-Sales vs. Existing Sales Channels

A worksheet to use to calculate the cost of sales for existing sales channels vs. an inside sales position.

100-Day Implementation Plan

A document listing the steps to take to implement an inside telephone sales position. This document also provides guidance on the workload required of the ISR manager once implemented.

Inside Telephone Sales Quantitative Measurements

A description of quantitative measurements used to manage the inside telephone sales position.

Inside Telephone Sales Business Case Worksheet

A worksheet to create a projected annual gross profit from the inside telephone sales position.

ISR Business Plan

A business case document and presentation for senior leadership.



When the business model is complete, it contains both activity goals and revenue targets for the inside sales team.

Getting Started

Now that the business case is in place and the economic model is proven, it's time to get started!

Before launching any new sales platform, there are many details that need to be considered. We'll provide guidance and support, and help you find the answers to fit your company, your product and services, and your customers.

Our consultants will work with you to help you get started. Deliverables include:

Getting started questions to ask and answer:

Understand your markets and customers

- What will the inside telephone sales representative sell?
- If they generate leads for products/services outside of what they sell, where will these leads go? How do we make sure these leads aren't dropped?
- What territories will they cover? How many customers will be in each?
- What product support responsibility does the inside sales representative have?

Determine customer criteria for assignment

- What is the size of customer for field sales coverage?
- What is the size of customer for inside sales coverage?
- Who will not get coverage and be assigned to marketing?

Determine opportunity (market share vs. potential size of the market)

- How can we prioritize customers by opportunity?
- Where can inside sales have the biggest impact?

Reporting channels

- How can we establish the reporting channel?
- Does the inside representative have a "dotted line" reporting responsibility to anyone?
- Is the inside sales representative a marketing or sales function?

How can we determine inside telephone sales accountability?

How can we establish business targets by territory?



Determining a Compensation Plan

Compensation plans need to be motivating, fit into your company's culture, and be cost effective. We have many compensation plan models to consider. We'll assist you in designing the compensation plan that works for you and fits the economic model established in the business case.

CRM

Do you have a customer relationship management system? And how does it need to be set up for outbound telephone sales? Your representatives will probably cover hundreds of customers. They need a way to organize customer information and the customer narrative, and to schedule call-backs and follow-up activities.

Job Description

You will need to create a clear job description, both for hiring and to set expectations for others within the organization.

Career Path

In some organizations, the inside sales representative is expected to stay in that role – it is a destination position. In other organizations, the inside representative is expected to transition in several years to field sales or management positions. The individuals you select will vary depending on what career path will be typical for your organization.

Call Outlines

Outbound telephone sales is not telemarketing – it cannot be scripted. Outbound telephone sales is open dialogue, however inside telephone sales representatives can use a call outline which provides structure for the call. Key aspects of call outlines are:

- Call objective
- Call opening
- Compelling reason to call
- Closed-ended questions
- Open-ended questions
- Next steps
- Closing statement

We will work with you to create call outlines for each major call objective. During training, your inside sales representatives will learn how to use the call outlines to achieve their objectives on each call.



Selection

There is nothing more important than hiring the right inside telephone sales representative!

Some perfectly good salespeople cannot do this job. They don't have the discipline to make the dials, don't have the ability to communicate without using body language or can't sit still for eight hours a day. Others only work well with a script – and this position requires open dialogue.

Hiring the right person begins with the career path and job description we have designed together. Once those decisions have been made, we will assist you in crafting the right selection criteria and putting in place a process that assures successful hires fit exactly.

We're also available to aid you in designing your selection process, and can participate in the selection process should you choose:

Designing the Process:

Resume Screening Form – Use this form to screen resumes for the ISR position. This form will allow you to assign a quantitative measurement to each resume.

Telephone Interview Rating Form – Use this form to conduct screening phone interview with candidates for the inside sales position. This form will enable you to assign a quantitative measurement for each candidate.

Face-to-Face Interview Form – Use this form to conduct the face-to-face interview with candidates for the inside sales position. This form will allow you to assign a quantitative measurement for each candidate.

Secondary Interview Form – Use this form to collect questions for the secondary interview and to conduct the interview. This form will enable you to assign a quantitative measurement for each candidate.

Job Shadowing Form – Hand this form to the candidate who is shadowing within your organization. Use this form to address any issues raised by the shadowing and to assess the candidate's understanding of the position.

Reference Checking Form – Use this form to assist you in checking references.

Personal Business Plan – This form provides the inside sales representative with his or her financial and activity goals for the position, customized to fit your environment. The Personal Business Plan forms the "contract" for the coaching process.

Assisting in the Selection Process

Our consultants can assist you with the interview process, especially with telephone interviews and resume grading which can be conducted remotely.



Hiring the right
person begins with
the career path
and job description
we have designed
together.

Orientation

Depending on how complicated your products and services are, and depending on the background and experience of the person you hire, our goal is to get the person on the phone and generating revenue as soon as possible.

For a new hire without experience at your organization, and for a typical portfolio of business-to-business products and services, an orientation timeframe of 25 days (five weeks) should be expected. During this time, the inside telephone sales representative will gain product knowledge, talk to others within the organization, go through sales training, and orient themselves into their assigned territory.

Deliverables include:

New ISR Orientation – Experienced

Use this document to evaluate the experience of the inside sales representative within the various departments of your organization if you are hiring an inside candidate.

New Hire ISR Orientation and Training Document

This document provides a 25-day orientation schedule for a new inside sales representative. We will customize as required for your organization, and, if the candidate is an internal hire, customize for his or her experience as documented on the “New ISR Orientation - Experienced” document.

Question Resource


This document provides the inside sales representative with additional questions he or she can ask customers about their use of your products and services, their business and about them personally.

Territory Analysis Form

This document is used to profile an ISR territory and should be updated monthly by the ISR and Manager for the first six months.

Inside Sales Representative Departmental Observation Form

This form is used by ISRs when observing another department within the dealership.



Our goal is to get the person on
the phone and generating revenue
as soon as possible.

Training

Orientation provides an introduction to your organization and fundamental product knowledge. Training provides the sales techniques required to sell open-dialogue over the phone.

What is different between face-to-face sales and telephone sales? Primarily, the lack of body language, which can be 60% of communication, and the need to have a compelling reason to call – how the inside sales representative will open the call to gain the customer's attention. When you are face-to-face, just the fact that you are there generates interest. Over the phone, you are interrupting the customer's day. Inside sales representatives are not telemarketers, they must learn and apply the special techniques required to engage customers and build relationships.

We offer a curriculum consisting of foundational level e-learning courses, intermediate and expert instructor-led courses. The foundational curriculum consists of modules based on the 19 competencies we have determined are critical to an ISR's success:

ELearning (online)

Systems Proficiency for Inside Sales Representatives — Learn the systems and techniques that will allow you to research a customer's request with confidence.

Customer Business Understanding for Inside Sales Representatives — Four techniques to better understand your customers and become more responsive to their needs.

Relationship Development for Inside Sales Representatives — Learn the skills and techniques required to increase customer loyalty and satisfaction and build good customer relationships at your organization.

Qualifying for Inside Sales Representatives — Learn about your customers and their needs to determine how your products and services can meet those needs.

Product and Solution Understanding for Inside Sales Representatives — Four techniques for broadening your product and solution understanding will enable you to better match your products, programs and services with customers' needs.

Consultative Selling for Inside Sales Representatives — Learn three consultative selling techniques to help you provide your customers with the products and services that best meet their needs.

Cross-Selling and Value-Based Selling for Inside Sales Representatives — Ask the right questions to ensure the customer receives the complete and appropriate solution to fulfill his or her needs.

Value Proposition for Inside Sales Representatives — Identify and communicate what advantages a customer will get from purchasing and using your products and/or services.

Closing for Inside Sales Representatives — Learn five techniques you can apply to close sales with more confidence.

Customer Care for Inside Sales

Representatives — Learn four techniques that will assist you in providing superior customer care.

Time Management for Inside Sales

Representatives — Learn five techniques that will help you communicate more effectively and assist you in dealing with customer problems and complaints.

Communication for Inside Sales

Representatives — Learn five methods to help you communicate more effectively and assist you in dealing with customer problems and complaints.

Continuous Learning for Inside Sales

Representatives — Learn four techniques that will help you continually learn on the job.

Handling Objections for Inside Sales

Representatives — Move the sales process forward and handle customer objections with confidence.

Territory Planning for Inside Sales

Representatives — Align your customer base in an orderly manner to enhance your selling ability.

Opportunity Generation for Inside Sales

Representatives — Hunt for revenue opportunities by generating excitement during a sales dialogue and by asking good, probing questions.

Sales Opportunity Management for

Inside Sales Representatives — Learn how to develop and execute a plan to capture a specific sales opportunity. This includes establishing the steps of the sales cycle, managing the sales cycle (buying committee, need requirements, risk and timeline), and knowing when to close.

Account Development for Inside Sales

Representatives — Create and execute a plan to improve the market share obtained from the customer. Account development includes establishing relationships with multiple contacts within the customer's organization, and being attuned to the customer's unique business situation.

Outbound Telephone Selling for Inside

Sales Representatives — Learn the basics of selling using the telephone, including the importance of opening the call, the compelling reason to call, how to handle gatekeepers and the use of a call outline.



High-Impact Telephone Sales Intermediate Course

2-Day or 4-Day Boot Camp

Course Objectives

At the conclusion of this two-day curriculum, the ISR will be able to:

- Proactively manage a telephone sales territory
- Plan the call, as well as develop a “compelling reason to call” for each customer/prospect
- Identify his or her selling style (direct, considerate, systematic or spirited), as well as determine the buyer’s style
- Actively listen and keep the customer engaged, using conversations to manage and direct the sales cycle
- Propose your organization’s services, products and supplies to customers
- Close the sale, knowing when to close and how to ask for the sale
- Overcome objections, up-sell and cross-sell, and how to establish your organization’s value vs. selling on price
- Qualify accounts (A, B, or C) and assign Planned Annual Rate of Call (PAR) values
- Position your organization’s products and services via up-selling and cross-selling
- Sell effectively into his or her territory, achieving assigned sales and activity objectives

Criteria: Current best practice as documented in your organization’s Implementation Guidebook and Inside Sales Rep (ISR) Excellence Fundamentals book.

Course Summary

This two-day session is designed to prepare ISRs to work an assigned territory within an organization and includes instruction on prospecting, account management, database management, sales execution and sales. To increase knowledge and further develop skills, ISRs will be learning through experience or “learning by doing” during the training. If the Boot Camp option is selected, after two days of High-Impact Telephone Sales in the classroom, each participant will begin building skills and applying knowledge immediately by making sales calls to his or her assigned customers, while being shadowed by an instructor/coach.

Prerequisites

Completion of the foundational e-learning courses.

Inside Sales Representative Sales Training

Advanced Courses

Advanced Overcoming Objections — Learn new ways of overcoming objections to tailor your approach to your specific sales situation. Objections mean your customer is emotionally invested in considering your product. Overcome the objection and close the sale.

Advanced Relationship Building — Building relationships over the telephone is hard work. Each phone call is fairly short, mostly consumed by business issues, and you don't have face-to-face contact. Learn how to build relationships on every call and craft unique questions that lead to eye-opening dialogue.

Closing the Proactive Sale — If you're selling product support, you know helping a customer with a problem is far easier than selling preventive maintenance or condition monitoring. Learn how to approach a customer, and close a sale, when the product is designed to prevent problems, not solve them.

Breaking Competitive Accounts — To increase market share, and grow a territory, a salesperson needs to take business from a competitor. These competitive accounts may have an entrenched relationship with another vendor and salesperson. Learn how to pierce this wall to increase your share of the business.

Time Management — How do the best inside telephone salespeople achieve 150 minutes on the phone each day and still get all the back office work done? Learn how to structure your day to achieve your activity targets, and still get the job done.

Negotiation — Negotiating over the phone without the benefit of body language can be a challenge. You may also be stuck with non-verbal communications such as text and email. Learn how to strike a profitable deal when you're not face-to-face.



Managing

Inside sales representatives are often beginning salespeople, and may be new to your industry. Unlike field sales, telephony equipment and customer relationship management (CRM) systems provide information to closely manage telephone sales. New salespeople need relatively constant “emotional nutrition” – feedback and support as they learn and grow. We train your managers, and provide the necessary support systems and metrics to achieve the targets in your business case.

Business Performance Group offers a full range of training courses for sales managers:

Leading High-Impact Sales

This course includes all the key elements of leading a high-impact inside sales organization, including business-to-business telephone sales concepts, business models, getting started, selection, orientation, training, coaching, key performance indicators and sales leadership.

This is our flagship course for managers of the inside sales function.

Peer to Boss

Often sales managers are created from the ranks of the sales group. This means that a future sales manager may move from being a peer with the rest of the sales team into a position of becoming their boss. This challenges both the sales group and the new manager. Learn how to make this transition.

Hiring and Selection

The most important job for any sales manager is to select their sales team. If the right individuals are hired, the sales plan can be successfully achieved. If the wrong individuals are hired, nothing will work. Learn how to select and hire the best salespeople to fit your environment and career path.

Retention

A terrible day is when your best-performing salesperson enters your office and announces they're leaving for a new position. Retaining your high performers is a critical task for the sales manager. Learn how to put processes and programs in place to keep the best.

Territory Management

Field salespeople may juggle 100 accounts, but an inside salesperson may wrestle with eight times as many. How does a salesperson sift through their accounts and decide who they'll call next? Learn how to help inside salespeople craft a territory management plan that maximizes your return on the investment you've made in them.

Compensation and Motivation — Yes, money is motivating to most salespeople. But the way the plan is crafted, designed and implemented is critically important to its effectiveness. Besides money, salespeople are also motivated by competition, an inviting work environment, and prospects for advancement. Learn how to create a dynamically motivated inside sales department.



New salespeople need relatively constant “emotional nutrition” – feedback and support as they learn and grow.

Coaching

Statistically, a good inside sales representative coach can raise revenue performance by 20%. Our coaching process is designed to be easy-to-implement and we'll train your managers to use it during the Leading High-Impact training course. If you don't have the resources or time to coach yourself, our coaches can help you gain that extra revenue boost.

Our coaching module is a five-step process:

Contracting — The manager must establish and clearly communicate his or her expectations. This includes quantifiable metrics (the number of daily customer contacts and other activity goals and revenue) and qualitative measures of adherence to the sales process.

Observation — Observation includes two dimensions. First, reviewing the telephone representatives' metrics (number of calls, revenue delivered, etc.) and second, listening to calls.

Action — Once the observation is complete, the coach will recommend improvement actions.

Commitment — When the coach discusses improvements with the representative, the next step is to obtain commitment to improve.

aCHieve — Often representatives need additional performance support or training to accomplish the action plan. We provide performance support tools to assist the coach.



Statistically, a good inside sales representative coach can raise revenue performance by 20%.

Leading

Leadership is designing good sales meetings and contests, boosting and maintaining a high level of motivation and implementing a sales culture second to none. We'll provide needed support, education and resources.

We use a Motivational Profile to determine if everything within the sales system is working as it should to move you forward to your sales goals.

Sample Customizable Documents

Inside Sales Rep (ISR) Quantitative Measurements (Examples)

| Measurement | Description | Advantage | Disadvantage |
|---|--|---|--|
| Phone Switch Measurements Calculated from the data provided by the phone switch | | | |
| Number of minutes on the phone per day (Phone Time) | Total talk time in minutes per day; typically calculated and averaged over a month | Supports long conversations | May encourage frequent calling of favorite customers |
| Number of dials per day | Total number of connected dials per day, typically calculated and averaged over a month | Supports activity requirements, can easily be compared to planned annual rate of call (PAR) and number of accounts (coverage) | May encourage indiscriminate dialing |
| Average talk time | Total talk time in a month divided by completed dials | Indicator of call quality | May not be meaningful in a new territory |
| Sales Results Calculated by sales information from accounting | | | |
| Market share within the account | A measure of market penetration | Universally accepted benchmark | Dependent on quality of data |
| Sales growth in territory | Sales within the accounts in the territory from one period to the next | A universal benchmark of a salesperson is sales growth | May be influenced by "starburst" sale or negative outcome in a few accounts |
| Growth in territory vs. growth in organization overall | Compares the sales growth in the ISR's accounts against the overall growth in sales at the organization | Allows comparison of ISR against general trends in a territory; good way to calculate the gain from the ISR sales pressure | May be influenced by "starburst" sale or negative outcome in a few accounts |
| Sales in territory | Sales in dollars generated by the accounts assigned to the ISR | Pure and traditional measurement of salesperson value | For a start-up position, does not take into account legacy, "would have happened anyway" sales |
| Activities Calculated by tally | | | |
| Number of proposals sent to customers or aggregated dollar value of proposals | Number of written (mail, or electronic) proposals sent to customers; can be used in conjunction with sales to calculate success percentage | Encourages ISR to propose and close | May encourage excess electronic and mail paperwork |
| Number of leads generated | Number of leads for other sales professionals within the dealership | Promotes generating leads for high-value opportunities | Requires communications between selling platforms and cross-reporting |
| Number of records cleaned | Quality of the data in the database – good addresses, telephone numbers and machine populations | Increase marketing and sales effectiveness | Requires a verification audit to check results |
| Cost per contact | Cost of ISR/number of contacts reached | Allows comparison to other channels | Requires an analysis of the quality of each type of contact |
| Other Analysis By Survey | | | |
| Customer satisfaction or customer loyalty | Survey metrics | Defines customer satisfaction with contact method and representative | Not tied directly to a revenue |

Call Outline – Capital Equipment

Situation: Prospects Who Have Recently Purchased Equipment with Financing (UCC filing)

Smile!

Verify – You have the correct contact. <Person who manages their equipment purchases.>

Clarify – “Hi, this is _____; I am your equipment account representative at <your organization>

Compelling Reason to Call – “I see that you have recently purchased a <describe equipment purchased>. I help successful organizations like yours acquire <your organization> equipment to complete their projects on time and on budget. Are you in the market for any additional equipment?”

[If no] *When will you be in the market again for new equipment?*

Open-Ended Questions:

Relationship – Equipment: *The UCC filing I have in front of me tells me that you bought a _____. Some of my customers buy equipment for general work, and some for a specific job. What was your reasoning behind the purchase of this equipment?*

Risk: *What things do you consider when deciding to buy new or used equipment?*

Buying Committee: *Describe to me your buying process for equipment.*

Relationship – Business: *Tell me about your business.*

Needs: *Tell me about your needs; what work do you need this new equipment to perform?*

Needs: *If you could wave your magic wand, what additional work would you like your equipment to perform?*

Risk: *What is important to you when you buy a different piece of equipment?*

Needs: *What challenges do you have with your current equipment?*

Needs: *What concerns, if any, do you have about investing in <our organization's> equipment?*

Timeline: *Tell me about your timeline for making any additional purchases of equipment?*

Closed-Ended Questions:

Relationship – Equipment: *What type of equipment do you have? Do you have the hours?*

Needs: *Do you have any specific equipment purchases in mind?*

Needs: *Do you know the benefits of lease-to-purchase?*

Needs: *Is equipment financing important to you?*

Risk: *Have you considered <our organization's> equipment before? (Why or why not?)*

Timeline: *When do you feel you'll be looking for new equipment?*

Needs: *What work tools do you use?*

Relationship – Business: *May I verify your email and physical address? Is this the best telephone number to use for you?*

Typical Next Steps: *Provide information on pre-qualified equipment. Close on the follow-up call.*

Close:

Current Need: *"As a good next step, I can provide you with information on <our organization's> equipment that will meet your needs and exceed your expectations. I'll customize what I send you to save you time. I'd like to set up a follow-up call to review the information, and if everything looks good to you, set up a time then when we can do a product demonstration. Would <time and day> work for you for our next call?"*

Future Need: *"I'd like to give you a call back a couple of months before you are in the market for new equipment again. I'd like to provide a competitive quote on <our organization's> equipment which I know will meet your needs and exceed your expectations. I'll plan on calling you around <date>. May I set up that time for us to talk?"*

Subsequent Calls - Notes for the ISR

The most powerful "compelling reason to call" for the next call is something from the customer narrative – something the customer said for you to recall. For example, "The last time we talked, you mentioned you were working on the Barker project. How did it go?" Try to probe about their business and current workload in the first call to prequalify a compelling reason to call from the customer narrative.

If there is nothing from the customer narrative in which to open the second call, try using a compelling reason to call similar to, "The last time we talked, you asked me to give you a call back now, and you told me you may be interested in purchasing some new equipment. Do you have any current requirements?"

Additional Open-Ended Questions:

Needs: *What current projects are you working on?*

Needs: *Tell me about your needs, what work do you need new equipment to perform?*

Needs: *Paint me a picture; what would you like your equipment to do for you?*

Additional Closed-Ended Questions:

Needs: *What work tools will you require?*

Equipment Sales

Inside Sales Representative (ISR) Job Description

Job Title: Inside Sales Representative (ISR)

Summary: The ISR is responsible for establishing and maintaining a business relationship with customers and prospects within his or her assigned territory and to qualify, propose and close equipment solutions. The ISR will be the primary point-of-contact for the customer, and a conduit for any and all relevant information.

Essential Duties and Responsibilities (other duties may be assigned):

- Continue to develop expertise in equipment and work tools through training, research and perpetual learning.
- Expand contacts within the organization as a resource for customers.
- Recommend <our organization's> solutions to improve cost-per-hour and demonstrate value.
- Manage an account base primarily using the telephone to deploy a disciplined call campaign, qualify accounts, update the customer's contact information, develop the relationship, and uncover opportunities for <our organization's> solutions.
- Complete 120 successful customer calls per week.
- Maximize equipment, parts and service sales by promoting all aspects of the organization's offerings.
- Establish a personal working relationship with customers based on value, knowledge, trust and character.
- Monitor and report all pertinent market information relative to competitive activity, customer information and product performance.
- Achieve the planned annual rate of call (PAR) for each customer.
- Provide leads for larger equipment sales to the appropriate organization contact.

Qualifications: To perform the job successfully, an individual must have good technical skills, people skills, and problem-solving capabilities, and be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skills, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Education/Experience: College or technical degree, or equivalent experience.

Language Ability: Ability to read and interpret documents such as safety rules, engineering drawings, operating and maintenance instructions and procedure manuals. Technical language skills required, along with the ability to write routine reports and effective correspondence, and to speak effectively over the phone.

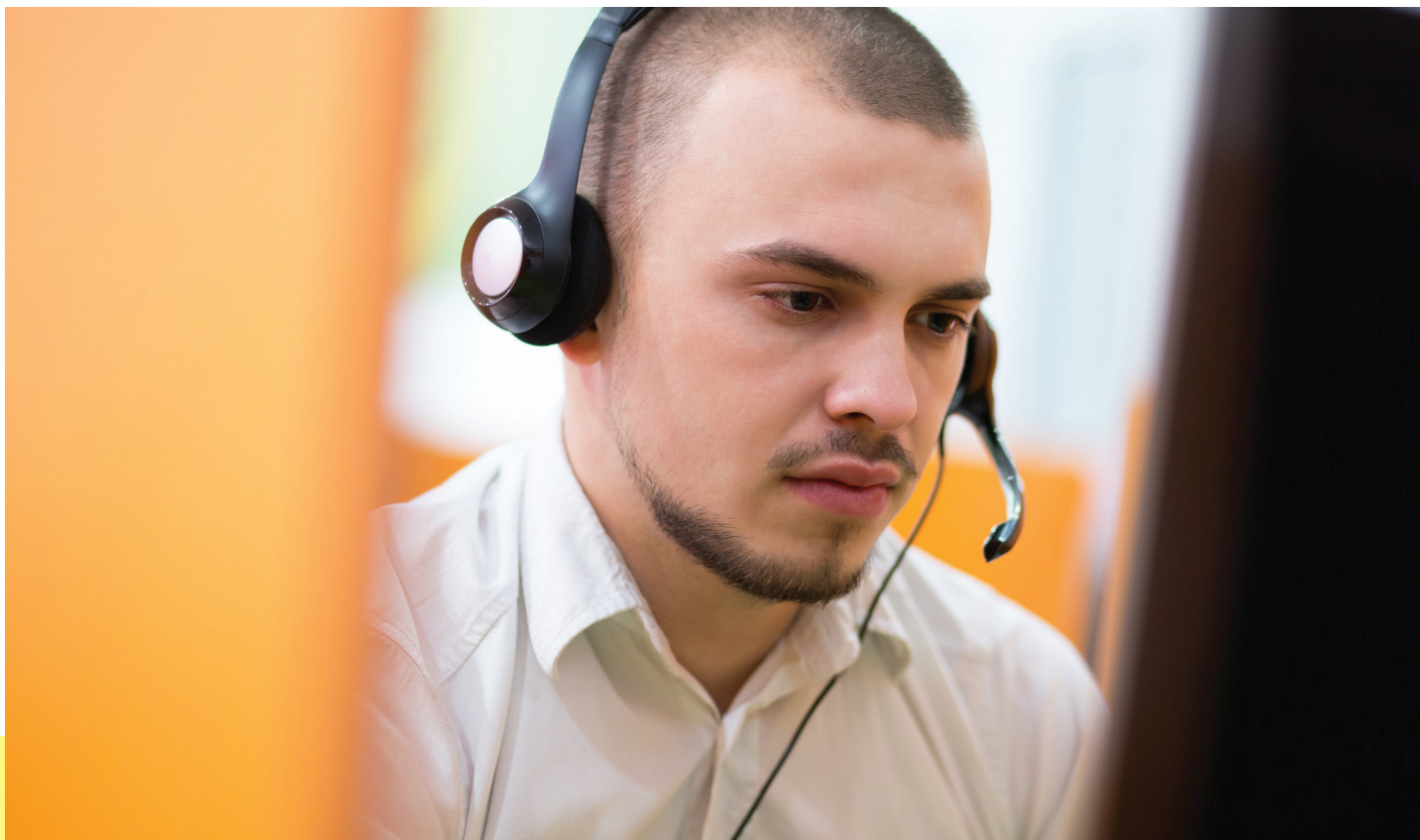
Math Ability: Ability to calculate figures and amounts such as averages, percentages, geometry, and statistics.

Mechanical Ability: Ability to understand the basic dynamics of equipment operation and design, and product applications.

Computer Skills: Demonstrate proficiency in the software applications of Microsoft Excel, Word and PowerPoint; customer relationship management system (CRM); business system; email system.

Work Environment: The work environment characteristics described are representative of those an employee encounters while performing the essential functions of the job. Reasonable accommodations may be made to enable individuals with disabilities to perform essential functions. While performing the duties of the job, the employee is frequently exposed to work near moving mechanical parts and outdoor weather conditions. The employee is occasionally exposed to fumes, airborne particles, and risk of electrical shock. The noise level in the work environment is moderate.

Physical Ability: Must be able to occasionally drive to customer work sites and lift up to 50 lbs.



Face-to-Face Interview Question Metric Example

1 – Impact and Influence/Consultative Selling

Desired behavior: Presents ideas and opinions in a constructive logical way and gathers all relevant information about customer’s needs.

- a) ☐ Describe a time when you needed to present an idea or opinion in order to influence another person. Were you successful? Why or why not?
- b) ☐ Describe a time when you were systematic in developing a sales strategy. What were the steps? How did you influence the customer to follow these steps? What was the outcome?
- c) ☐ Think of a time when you’ve coached someone on a skill or knowledge. Tell me how you did it. Did his or her behavior change? Why or why not?
- d) ☐ How would you handle a customer who said we were overpriced?
- e) ☐ How would you respond to a customer who said it is difficult to deal with us because our organization is too big?

| Discussion indicates the candidate: | | | | | | |
|--|---|--|------------|--|---|-------------|
| Exhibits little or no ability to overcome obstacles. Does not respond well to resistance or pushback when attempting to motivate others to action. | | Some general ability to generate progress in motivating individuals to action. Can overcome some obstacles, but gets stuck with others. Can overcome some difficult situations to be successful. | | Demonstrates clear ability and motivation to persuade others to his/her point of view. Drives relationships toward mutually beneficial results. Can overcome challenges and difficult situations to be successful. | | |
| Unacceptable | ← | → | Acceptable | ← | → | Outstanding |
| 1 | 2 | 3 | 4 | 5 | | |
| Circle your overall rating of the candidate on this desired behavior. | | | | | | |

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Business ■ Performance Group

Business-to-Business Inside Telephone Sales –
Program Consulting, Sales Training and Coaching
