

E & T ISR Boot Camp (Course #41443)

Embassy Suites Indianapolis Downtown, 110 W Washington St, Indianapolis, IN & Cat Large Engine Center, Lafayette, IN
Course Outline



Inside sales requires critical skills. Your ISRs only have seconds to capture a customer’s attention and turn a conversation into a sales opportunity! This 4-day “Boot Camp” sales training workshop is designed to prepare ISRs selling for Power Systems how to proactively manage an assigned territory and includes instruction on prospecting, account management and stratification, sales execution, and sales of product support for Power. This instructor-led training is held in Indianapolis/Lafayette, IN and includes 2 days of classroom instruction on the customized *High-Impact Telephone Sales*. To increase knowledge and further develop skills ISRs will get practical application training, including making live sales calls to their assigned customers while being shadowed by a sales coach. The boot camp also includes a full day at Caterpillar's Large Engine Center in Lafayette for product training from Cat’s Power Solutions subject matter experts.

ISRs are responsible for their own travel and need to arrive in Indianapolis on Monday prior to the first day of class.

Course Name	E & T (Power Systems) ISR Boot Camp – Instructor-led Training (Course #41443) Available in a virtual instructor-led format by request
Course Objectives	<p>Upon conclusion of the 4-day workshop, the Inside Sales Rep will be able to:</p> <ul style="list-style-type: none"> • Proactively manage a telephone sales territory • Plan the call, how to develop a “compelling reason to call” for each customer/prospect • Ask probing questions to understand and stratify customer needs • Identify his or her selling style (direct, considerate, systematic, or spirited) as well as determine the style of their buyer • Actively listen and keep the customer engaged using conversations to manage and direct the sales cycle • How to use Relationship, Opportunity, and Need (RON) to position and sell Customer Value Agreements (CVA) • Discuss Inspection Reports in detail with customers and prospects • Qualify accounts (A, B, C) and assign PAR values • Use questioning techniques to uncover needs and build relationships with customers • Overcome objections • Close the sale, know when to close and how to ask for the sale • Position dealer products and services via up-selling and cross-selling • Sell effectively into his or her territory achieving assigned sales and activity objectives • Sell condition monitoring leads in a non-territory setting (supporting a PSSR)

	Criteria: Current best practice as documented in the <i>ISR Excellence Fundamentals Guidebook</i> and the <i>Product Support for Power Systems Target Market Guidebook</i>
Course Summary	<p>This 4-day “boot camp” is designed to prepare ISRs to work an assigned territory within a dealership and includes instruction on prospecting, account management, database management, sales execution, and sales of product support for E &T (Electric Power Generation, Oil & Gas, Marine, Industrial Engine and On-Highway Truck). To increase knowledge and develop skills taught in the instructor led portion of the class ISRs will also get practical experience during the training. After two days of <i>High-Impact Telephone Sales</i> in the classroom, each participant will begin practicing techniques and applying knowledge immediately by making sales calls to his or her assigned customers while being shadowed by an instructor.</p> <p>Primary Instructor: David Alumbaugh, Business Performance Group</p>
Prerequisites	<ul style="list-style-type: none"> • Minimum prerequisites = 25 Day “New Hire ISR Orientation Plan for Power Systems” as outlined in the <i>Power Systems ISR Product Support Guidebook</i> • Complete dealer training on Parts System and the dealer’s CRM (SalesLink etc.)
Duration	<p>4- day workshop</p> <p>Approximate time distribution:</p> <ul style="list-style-type: none"> • Sales Simulation/Role Plays – 20% • Facilitator-led sessions – classroom – 30% • Product training, Cat SMEs – 25% • Working within his or her dealer territory (with sales coach) – 25%

Power ISR Boot Camp Outline

Monday

Arrive at Embassy Suites Indianapolis Downtown hotel in Indianapolis
6:00 PM Group Dinner

Tuesday

8:00 AM – 9:00 AM	Presentations on Market Analysis
12:00 PM – 12:30 PM	Lunch
9:00 AM – 5:00 PM	High-Impact Telephone Sales Training (Classroom) – and Individual meetings with Instructor – Day One
6:30 PM	Dinner

Wednesday

8:00 AM – 4:00 PM High-Impact Telephone Sales Training (Classroom) continued – Day Two
12:00 PM – 12:30 PM Lunch
4:00 PM – 5:00 PM Sales Role Play Exercises/Case Studies
6:30 PM Dinner

Thursday

8:00 AM – 5:00 PM ISRs to make live customer calls while being shadowed by sales coach, providing feedback. Each ISR individually coached on his or her ABC customer accounts and account segmentation, and debrief sessions with each coach
12:00 PM – 12:30 PM Lunch
6:30 PM Dinner

Friday

7:30 AM – 8:30 AM Travel to Caterpillar's Large Engine Center – Lafayette, IN.
8:45 AM – 12Noon Guided Tour to include: Engine and component engineering, machining, assembly, generator set packaging; Cat 3500 Platform, Cat C175 Platform, Cat 3600 Platform
12:00 PM – 12:30 PM Lunch
12:30 PM – 3:30 PM Instructor led classes with Caterpillar SMEs... Including:
Jason Weber -CAT® Switch Gear & ATS / Batteries, **Landon Wellman** – Customer Value Agreements
3:35 PM – 4:30 PM Travel back to Indianapolis airport – drop off for departing flights (or return to hotel for those staying over)