

TRAINING LEADER'S GUIDE

JUST A CALL AWAY Series

The Outbound Call

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FOREWARD

This program is designed as a half-day training session on handling the outbound call.

Just as the organizations that use this program are wide and varied, so are the desired outcomes of the participants attending. As a result, we have tried to make *The Outbound Call* as generic and flexible as possible.

This manual will provide you with some background notes, along with practical activities and suggested running times. Feel free to add to or adapt the structure of this training session to suit your needs.

You do not need to complete all exercises provided unless they suit the specific requirements of your organization. Of course, the agenda is only a guide. The time spent on each activity is entirely dependent on the objectives of the trainer/facilitator and the progression rate of participants.

PREPARATION

In order to maximize the benefits of this training session, we recommend that the trainers/facilitators familiarize themselves with the topic at hand. You should be comfortable with the material in both the manual and the video.

You have been supplied with master copies of overhead transparencies and participant handouts. Make sure that sufficient copies of each have been prepared prior to the training session.

In the training room, you will need the following:

- Overhead projector
- Monitor and VCR player
- Whiteboard with markers and eraser
- Note paper and pens or pencils for participants

SYNOPSIS

JUST A CALL AWAY – The Outbound Call

Isaac Jones works in a busy insurance company call center. His job is to make appointments for sales representatives to visit potential customers. His first call of the day is to a home business, The Foxfield Racing Stables. It turns out to be a disaster. He is strung along by 9-year-old Danielle, who has him believing the loss of her guinea pig was really the theft of a million dollar racehorse.

After learning some basic techniques about setting objectives, developing a call guide, qualifying the customer, and handling the Gatekeeper, the confusion is averted. He also learns tips on when to leave messages and the importance of measuring his success.

After several unproductive calls, Isaac encounters Franco, who is in the midst of moving his office and has an angry visitor at the door. For Isaac this is simply bad luck — he couldn't have picked a worse time to try to share the benefits of his company's services. He initially responds emotionally, winding up his prospect into an emotional frenzy. Once again, after mastering some simple techniques, he maintains a professional attitude and learns to handle the call effectively.

However, these unproductive calls leave Isaac with a bout of call reluctance that could seriously affect his work. By talking to a colleague and remembering his successes, he is soon back on track and ready to make his "call backs."

The story concludes with a positive response from The Foxfield Racing Stables and, surprisingly, another introduction to the notorious Franco.

ICON KEY



Read



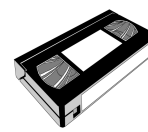
Overhead



Ask and Discuss



Handout



Video

COURSE STRUCTURE AND RUNNING TIME

This course has been designed to run as a half-day training session. If you do all of the coursework within the allocated running time, your training session should run for approximately 4 hours.

COURSEWORK	RUNNING TIME
Welcome	15 minutes
Objectives and Agenda	10 minutes
Introduction	15 minutes
The Video	35 minutes
Break	10 minutes
The Discussion	30 minutes
Activity 1 — Call Objectives	10 minutes
Activity 2 — Call Guide	15 minutes
Activity 3 — The Gatekeeper	10 minutes
Activity 4 — Products and Benefits	15 minutes
Activity 5 — True or False?	15 minutes
Summary and Debrief	50 minutes

WELCOME

Time: 15 minutes

Trainer's Instructions:

- Welcome all participants to the *The Outbound Call* training session.
- Introduce yourself and tell the group something about your training background.
- Explain how the training session is to be structured, how long it will run, when the video will be shown, when breaks will be taken, what refreshments are available, and where the phone and restrooms are.

OBJECTIVES AND AGENDA

Time: 10 minutes

Trainer's Instructions:

- Discuss the objectives and agenda of this training course with the group. Whether you're calling business to business or business to consumer, this training course will provide you with some valuable tips to help build relationships with customers.



After completing the training session on *The Outbound Call*, you will understand the following:



- Setting primary and secondary objectives
- Measuring success
- The basics of creating a call guide for the first 15 seconds
- Handling the Gatekeeper
- Handling the unappreciative prospect
- Dealing with call reluctance
- Building customer relationships
- Signing off with service

INTRODUCTION

Time: 15 minutes

Trainer's Instructions:

- Using your own research and the brief notes provided below, give participants a brief overview of the importance of the outbound call to their own organization.
- Invite questions and discussion from the group as you go.



The outbound call is a way to increase customer service. It can be a way of canvassing new customers, informing customers of new products, or simply following up sales for feedback on how your organization can better service their needs. In America, the outbound call generates \$435 billion worth of revenue.

Making the outbound call is all about building relationships. When a prospect has a need for a particular product or service, he or she will gladly accept the call and listen to a pitch from an outbound caller. If they don't have a need, they will see the outbound caller as an annoying interruption to their busy lives.



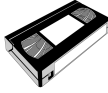
The aim of a successful call is to:

- 1. Initially establish a rapport**
- 2. Engage the prospect in a needs analysis**
- 3. Offer a solution**
- 4. Close the sale or complete the objective of the call**

THE VIDEO

Time: **Video 15 minutes**
 Discussion 20 minutes

Trainer's Instructions:



- Play the video *The Outbound Call*.
- Lead a short discussion around the video.



- Have you ever had any experiences like those of Isaac (either as a customer or as a call center agent)?
- What sort of personality traits did Isaac display even in the very beginning?

Answer: polite, enthusiastic, friendly

- Do you think that being polite, enthusiastic, and friendly was enough for Isaac to develop a rapport with his first caller?
- How do you feel about the way Isaac initially represented his intentions?

THE DISCUSSION

Time: 30 minutes

Trainer's Instructions:

- Using the overheads and your own notes, continue to lead the discussion, encouraging participants to ask questions as you go.



The outbound caller will always have at least two objectives:

1. A primary objective — that is, what he or she hopes to achieve from the call.
2. A secondary objective — which is to leave a positive impression of your organization regardless of whether the prospect is interested in your product or service.



PRIMARY OBJECTIVE
what you hope to achieve from the call

SECONDARY OBJECTIVE
leave a positive impression of your organization



In order to measure your success, you must focus on your objectives and record your progress when you complete your call. It sounds very simple, but it's the only way of accurately knowing how you are performing.

There are three rules for setting your objectives. You must write them down. They must be realistic, and they must be measurable.



RULES FOR SETTING OBJECTIVES

- a. You must write them down.**
- b. They must be realistic.**
- c. They must be measurable.**

When you have done that, you must focus on them before you make the call.



As you saw in Isaac’s conversation with Danielle about Fluffy, the first 15 seconds of a call are crucial. You need to explain who you are, where you’re from, and what you want. Find out if you’re speaking to the right person and, if you are, peak their interest.



YOUR CALL GUIDE

Who you are
Where you are from
What you want
Are you speaking to the right person?
Peak their interest
Friendly, natural delivery
Avoid reading your guide



It’s a tough ask for 15 seconds, but it can be done.

Remember to make your delivery friendly and natural — avoid reading your call guide whenever possible.

When you encounter those people we call the “Gatekeeper,” bear in mind that although that person is not your customer, they know who is. So be polite and respectful and remember their name.

Try not to leave messages with the Gatekeeper. Instead, find out a convenient time to call back.



RULES FOR THE GATEKEEPER

Be polite and respectful
Remember their name
Try not to leave messages
Find out a convenient time to call back



No one is sitting around waiting for you to call them and offer a product, service, or solution to a problem that they don’t know they have. So sometimes your reception may be less than friendly.



When an initial response is curt, ask permission to go forward. If it is denied, remain polite, apologize, and thank them for their time.



RULES FOR THE UNAPPRECIATIVE PROSPECT

Ask permission to go forward

Remain polite

Apologize

Thank them for their time



After a series of calls where you don't achieve your objectives, it's quite common to face call reluctance. You would gladly do anything but pick up the phone and dial or hit the button for the next customer. This is normal. It happens when you take the rejection personally. Whatever happens, you cannot take rejection to heart — even the rudest customers are not rejecting you personally.

Fear of rejection is real. Recognize it and let it go. Talk to a colleague about it, and remember to be supportive to colleagues when they talk to you. Remind yourself of previous successes, and reward yourself for reaching smaller goals.



CALL RELUCTANCE

Don't take rejection personally

Recognize the fear and let it go

Talk to a colleague

Remind yourself of previous successes

Reward yourself for reaching smaller goals



In the body of your call, ask pertinent questions, listen carefully, and focus on the problems you solve, not the product you sell.

Sign off with service!



And finally, always sign off with service, which means a genuine offer of continuing assistance from yourself and your organization.

ACTIVITY 1: CALL OBJECTIVES

Time: 10 minutes

Trainer's Instructions:



- Divide participants into groups of six to eight and ask them to list primary and secondary objectives for a specific outbound call. Either use the example the class is/will be working with or use the example from the video. For example, what are Isaac's primary and secondary objectives?
- Go through the responses on the whiteboard and discuss whether they can be characterized by being written, realistic, and measurable.

ACTIVITY 2: CALL GUIDE

Time: 15 minutes

Trainer's Instructions:

- Divide participants into groups of six to eight and ask them to list five important things to include in a call guide.
- Go through the responses on the whiteboard and discuss why they are important.

Suggestions:

- Who you are
- Where you're from
- What you want
- Are you talking to the right person?
- Peak their interest
- They are important because you must **HONESTLY REPRESENT YOUR INTENTIONS**



ACTIVITY 3: THE GATEKEEPER

Time: 10 minutes

Trainer's Instructions:

- Divide participants into groups of six to eight and ask them to list the do's and don'ts for handling the Gatekeeper.
- Go through the responses on the whiteboard and discuss why they are important.



Dos

Remember, the Gatekeeper may not be your customer, but they know who is the customer.

Be polite and friendly.

Honestly represent your intentions.

Remember their name.

Find out information about who you need to speak to.

Find out a convenient time to call back.

Don'ts

Don't be rude.

Don't be dismissive.

Don't leave messages.

In the case of children or vulnerable individuals, don't ever be misleading or manipulative.

ACTIVITY 4: PRODUCTS AND BENEFITS

Time: 15 minutes

Trainer's Instructions:

- Ask participants to complete The Product Verses the Problem handout.
- Go through the responses on the whiteboard, and discuss the differences between products, features, and benefits.

The Product Versus the Problem Facilitator's Copy



Product or Service	Problem it could solve for the customer
Dipsy Doodle Doggy Wash	It won't be you chasing Rover around the yard, dragging him towards the bucket and soap, and pulling out those nasty, prickly burrs that he gets between his paws.
Tires	They will address your concerns about the safety of yourself or your family on the road.
Pre-paid Cremation	Your family will not have the worry of deciding what you might have wanted.
Frozen Pizza	You will have more time to watch television instead of sweating over a hot stove.
Net Banking	You can do your banking at midnight if you didn't get time to make those important payments during the day.

ACTIVITY 5: TRUE OR FALSE?

Time: 15 minutes

Trainer's Instructions:

- Ask participants to complete the True or False? handout.
- Go through the handout and discuss the answers. Address any questions the group may have.

True or False? Facilitator's Copy

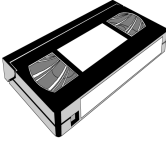


Statement	True/False
Call reluctance could never happen to me.	False
When you're feeling reluctant to make calls, keep it to yourself. It will only bring everyone else down if you share your concerns.	False
Remembering your successes will boost your confidence and help alleviate call reluctance.	True
If a customer is rude, obnoxious, and angry that you have called them, they are not rejecting you. Rather, they are rejecting the product or service you are offering.	True
Ask permission to go forward when you receive a curt initial response.	True
If the caller is upset about your calling, hang up without saying anything.	False
Ask probing and clarifying questions to determine the customer's needs.	True
Offer customers solutions to their problems rather than trying to sell them a product or services.	True
Sign off the call by thanking the customer for their time.	False

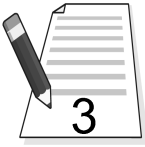
SUMMARY AND DEBRIEF

Time: 50 minutes

Trainer's Instructions:



- Play the video again.
- Go through some of the training points highlighted in the video using the overheads.
- Ask for and answer any questions that participants may have.
- Let participants know if and when any follow-up training is to be conducted.



- Give participants a copy of the Summary Sheet handout.

PARTICIPANT HANDOUT
MASTERS



THE PRODUCT VERSUS THE PROBLEM

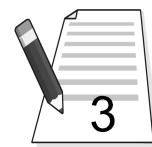
Product or Service	Problem it could solve for the customer
Dipsy Doodle Doggy Wash	
Tires	
Pre-paid Cremation	
Frozen Pizza	
Net Banking	



TRUE OR FALSE?

Decide whether the following statements are true or false.

Statement	True/False
Call reluctance could never happen to me.	
When you're feeling reluctant to make calls, keep it to yourself. It will only bring everyone else down if you share your concerns.	
Remembering your successes will boost your confidence and help alleviate call reluctance.	
If a customer is rude, obnoxious, and angry that you have called them, they are not rejecting you. Rather, they are rejecting the product or service you are offering.	
Ask permission to go forward when you receive a curt initial response.	
If the caller is upset about your calling, hang up without saying anything.	
Ask probing and clarifying questions to determine the customer's needs.	
Offer customers solutions to their problems rather than trying to sell them a product or services.	
Sign off the call by thanking the customer for their time.	



SUMMARY SHEET

In order to measure your success, you must focus on your objectives and record your progress when you complete your call.

The first 15 seconds of a call are crucial. You need to explain who you are, where you're from, and what you want. Find out if you're speaking to the right person and, if you are, peak their interest.

Remember to make your delivery friendly and natural. Avoid reading your call guide whenever possible.

Bear in mind that although the Gatekeeper is not your customer, they know who is. So, be polite and respectful, and remember their name.

Try not to leave messages with the Gatekeeper. Instead, find out a convenient time to call back.

Don't take rejection to heart. Even the rudest customers are not rejecting you personally.

When an initial response is curt, ask permission to go forward. If it is denied, remain polite, apologize, and thank them for their time.

Fear of rejection is real. When you are suffering call rejection, recognize the fear and let it go. Remember, the customers are not rejecting you personally, only the product or service you are offering. Remind yourself of previous successes, and reward yourself for reaching smaller goals.

In the body of your call, ask pertinent questions, listen carefully, and focus on the problems you solve, not the product you sell.

And finally, always sign off with service — an offer of continuing help and assistance from your organization.

NOTES:

**OVERHEAD
MASTERS**



OBJECTIVES AND AGENDA

After completing this training course, you will understand:

- Setting primary and secondary objectives
- Measuring success
- Creating a call guide for the first 15 seconds
- Handling the Gatekeeper
- Handling the unappreciative prospect
- Dealing with call reluctance
- Building customer relationships
- Signing off with service



The aim of a successful call is to:

- **Initially establish a rapport**
- **Engage the prospect in a needs analysis**
- **Offer a solution**
- **Close the sale or complete the objective of the call**



PRIMARY OBJECTIVE

**what you hope to achieve
from the call**

SECONDARY OBJECTIVE

**leave a positive impression
of your organization**



RULES FOR SETTING OBJECTIVES

- **You must write them down.**
- **They must be realistic.**
- **They must be measurable.**



YOUR CALL GUIDE

- **Who you are**
- **Where you are from**
- **What you want**
- **Are you speaking to the right person?**
- **Peak their interest**
- **Friendly, natural delivery**
- **Avoid reading your guide**



RULES FOR THE GATEKEEPER

- **Be polite and respectful**
- **Remember their name**
- **Try not to leave messages**
- **Find out a convenient time to call back**



RULES FOR THE UNAPPRECIATIVE PROSPECT

- **Ask permission to go forward**
- **Remain polite**
- **Apologize**
- **Thank them for their time**



CALL RELUCTANCE

- **Don't take rejection personally**
- **Recognize the fear — let it go**
- **Talk to a colleague**
- **Remind yourself of previous successes**
- **Reward yourself for reaching smaller goals**



Sign off with service!

NOTES: