

# Close It!

## *A Choose-Your-Own Sales Adventure*

### **Module Overview**

In this course, users will navigate a simulator designed to take them through each step of the client's 4-step sales process. Since inside sales is an intricate process that requires attention to a number of details, such as tone, pacing, rapport, and phrasing, a trainee must be taught to consider a number of factors simultaneously. He must also control the arc of the conversation, much like a quarterback shapes and controls the action in a football game. The user will be guided by a virtual trainer, "Marie," played by an actor. She will act as a coach, providing instruction and feedback. Since closing the sale is the most difficult—and most critical—step of the process, users will be challenged to guide a conversation from the opening greeting through the close. 10-15 distinct customers with unique backgrounds, manners, and states of emotion will provide 10-15 levels that must be passed by closing the sale. For example, an early level might entail a conversation with a wealthy customer who has recently moved to the area and is paying a leisurely visit to find out about her options for a free checking account. A more advanced level might include a rather rushed businessman complaining about an overdraft charge on his account. In each case, the user must navigate the conversation to identify the needs of the customer and convince him or her to open a new or additional line of business. At each of several junctures in the conversation, the user must choose the tone and content of what he will say from a number of options provided. (In a few scenarios, the customer cannot be sold on a new or additional line of business, and the user must discern when to abandon the sale in order to avoid annoying or angering the customer.)

During a simulated conversation, 2 types of feedback will be available: instant and playback. This will allow the user to feel the flow of a conversation from start to finish or break it down and receive feedback at each step. The customer meter on the right hand side of the screen, which starts at the median point at the beginning of a new conversation, indicates a customer's mood and interest. To close a sale, the meter must reach a high threshold. With each well-chosen response, the meter goes up. With each improperly-chosen response, the meter goes down, and the user can then click on it for instant tips from Marie. After a conversation has concluded, Marie appears and takes the user through a playback of it, commenting and giving pointers. Once a user has passed the first few levels, a clock icon will appear for the duration of a simulation, offering the user a chance to turn back the clock on an interaction. He can then retry a tricky section or review what has already happened in the conversation.

### **Course Sample**

*In this sample, the user is dealing with a customer, Jim. He is portrayed by an actor and viewed from a first-person perspective. Step 1 of the sales process (Greet the Customer) is automatically completed. The user must then navigate the rest of the conversation, attempt to discern potential new lines of business in which the customer might be interested, and close the sale.*

### **Module AA01: Intro**

User: Hi! How can I help you today?

Jim: Hey. I, uhh... I'm pretty sure I lost my debit card. I've been looking for it and I can't find it anywhere.

User: Oh no! I hate it when that happens.

Jim: Yeah, it pretty much stinks. So I'm not sure exactly what I have to do...

User: We'll definitely take care of that for you here. It's pretty simple: We'll cancel that card right away so no one else can use it, and we'll get you a new one ordered so you can have access to your funds as quickly as possible. Let me just verify your information...

*The customer's card is canceled and a new one is ordered.*

User: Everything should be fine. You'll have a new card in no time. It'll take about 3 or 4 business days for it to arrive at your home address.

*The action pauses, as with each juncture in the conversation. This is assumed for the rest of the sample.*

### Module BA01: Juncture #1

#### *Content choices:*

1. Do you have something coming up that you need to be able to withdraw funds for?
2. If you need to withdraw funds during that time, just come on in to the branch and we'll help you out.
3. Is there anything else I can help you with?
4. Have a nice day!
5. Would you be interested in opening another account? That'll help you out if you ever lose your card again.

#### *Tone and Pacing choices (These are always the same):*

1. Jocular; nonchalant
2. Friendly; relaxed
3. Cordial; steady
4. Businesslike; succinct
5. Matter-of-fact; direct
6. Urgent; rapid

*User's choices: Content – 1. (Ideal); Tone and Pacing – 3. (Ideal)*

*The customer meter rises, as with each subsequent ideal choice.*

Jim: No, nothing in particular. I just use that card all the time and I like to be able to check my balance whenever I'm out, you know? I've got a few big things coming up that I need to

buy, and I've got to make sure I leave enough in the account and don't go off and buy, like, a new phone I can't afford or something.

User: Definitely.

### Module BA02: Juncture #2

#### *Content choices:*

1. If you'd like, I can tell you about your options for opening a second account. It's really easy, and you can keep your day-to-day purchases separate from some of the bigger stuff you're saving up for.
2. Would you like a printout of your recent activity so you can stay up to date?
3. I notice you've just got the one checking account with us. Why don't you open a savings account so you can keep things organized? It's really easy and I could set it up for you in about five minutes here.
4. So you've got to make sure you can manage all of your purchases out of this one account. Do you have a savings account to help you manage your purchases?
5. What you need to do is open a savings account so you can have things spread out a bit.

#### *Tone and Pacing:*

*(Same options as previously stated. This will be assumed for the rest of the sample.)*

*User's choices: Content – 4. (Ideal); Tone and Pacing – 2. (Acceptable)*

*The customer meter rises slightly.*

Jim: No. I get my paycheck deposited into this account, and they've got me set up with a 401k at work. I use this account for pretty much everything.

User: Got it.

### Module BA03: Juncture #3

#### *Content choices:*

1. In this economy, you might want to rethink your 401k. CD's can be a lot safer, and we have some really good rates available right now.
2. Other than the 401k, what else are you doing to save for retirement?
3. I can see how it's a pain to lose your card when you're using it all the time. How do you usually go about paying your bills?
4. A lot of customers in your situation have a checking account and a savings account open with us, and it helps to keep day-to-day expenses separate from bigger ones. Plus there is easy access to either account if you lose the card for one of them.
5. I think a savings account would really help you to stay organized, plus it will give you another card you can use as a backup. I can open one up for you right now.

*User's choices: Content – 2. (Problematic); Tone and Pacing – 3. (Ideal)*

*The customer meter falls slightly.*

Jim: Nothing. I'm really not concerned with it at the moment, to be honest. My 401k plan is more than enough for me. I get by all right.

User: Okay.

Module BA04: Juncture #4

*Content:*

1. Still, the rates right now on CD's have never been better. Putting aside a nest egg for the future can help for retirement OR for saving for some of those big things you'll want later on—like a new home or vehicle.
2. That's great! It sounds like you're on top of things.
3. In this economy, you might want to rethink your 401k. CD's can be a lot safer, and we have some really good rates available right now.
4. So you just need a reliable way to access your funds, and make sure money's set aside for the big things?
5. I think a savings account would really help you to stay organized, plus it will give you another card you can use as a backup. I can open one up for you right now.

*User's choices: Content – 4. (Ideal); Tone and Pacing – 4. (Ideal)*

*The customer meter rises.*

Jim: Yeah, that's right.

Module BA05: Juncture #5

*Content:*

1. What kinds of things are you saving for?
2. A lot of customers in your situation have a checking and a savings account open with us, and it helps to keep day-to-day expenses separate from bigger ones. Plus there is easy access to either account if you lose the card for one of them.
3. Do you have a moment to hear about our free savings accounts? They're simple to open and I think if you had one it would really help you to organize your spending.
4. Once your card issue is resolved, drop in sometime and let me know if you'd like to hear about our free savings accounts. They're simple to open and I think if you had one it would really help you to organize your spending.
5. Is there anything else I can help you with?

*User's choices: Content – 3. (Fair); Tone and Pacing – 2. (Fair)*

Jim: Uhhh, I don't know. I don't really think I have time right now.

*The customer meter falls.*

*INSTANT FEEDBACK: The user clicks on the customer meter on the right hand side of the screen. The action is paused and Marie appears.*

Marie: It's good to be polite and to be respectful of the customer's time. However, be careful not to overuse phrases like "Do you have a moment," or "If I can just have a second of your time." You have something that is going to make their life better! Of course they have a moment! And if by chance they don't, it should be pretty obvious. If you're smiling and confident, most customers will want to keep talking to you.

*Marie disappears and Jim repeats his previous line.*

Jim: Uhhh, I don't know. I don't really think I have time right now.

### Module BA06: Juncture #6

*Content choices:*

1. Okay. No problem. Next time you get a chance, check it out. It's a good way to go.
2. I understand. The whole process takes about five minutes, though. It's totally free, and if you lost your card next time, you'd always have a backup. What do you think?
3. Sure you do. It's only about a five-minute process. I'll take you through it right now, and you'll be able to save for the big things and spend on the little things, plus you'll always have that backup debit card. What do you say?
4. We have two kinds of free savings accounts, and they're both easy to set up. One pays a higher rate of interest and you simply need to maintain a higher minimum balance. The other pays a lower interest rate but has no minimum balance you need to worry about. If you can take just a few minutes here, you'll be set up with a new account and you'll have that backup debit card, plus a better way to structure your spending. What do you think?
5. Are you sure? It only takes about five minutes to set it up, and I could do it with you right here.

*User's choices: Content – 2. (Ideal); Tone and Pacing – 4 (Ideal)*

*The customer meter rises.*

Jim: Well . . . I guess it wouldn't be a bad idea. I just hadn't thought that much about it before. Maybe I'll open it up next time I come by. Would that work?

### Module BA07: Juncture #7

*Content:*

1. You should just take care of it now. If you don't, you might regret it, especially if you lose your card again.
2. Of course. You know where we are!
3. Sure. Just don't forget! The process is very easy and it sounds from your situation like a free savings account would serve you very well.
4. Yes, if you're sure you can't take care of it now . . .

5. That would be fine. If you were to take care of it now, then you'd get both cards in the mail at the same time, and you can start saving right away instead of having to come in again next week.

*User's choices: Content – 3. (Problematic); Tone and Pacing – 2. (Acceptable)*

*The customer meter falls.*

Jim: Yeah, sure. I'll look into it next time. It sounds like a good thing . . . Anyway, thanks for your help.

User: My pleasure. Have a nice day.

Jim: You too.

*The conversation is over. Jim leaves the branch, and Marie appears.*

### Module CA01: Review and Evaluation

Marie: Not bad! You did a lot of things right. But you didn't close the sale this time around. Let's take a look at the tape and see what you can improve for the next time.

*A third person perspective "tape" of the interaction is played from the beginning, with Marie interjecting after each user-navigated juncture.*

*Conversation plays. Following Juncture #1:* At this point, you're gathering information about the customer and analyzing his situation. We want to learn as much as we can so as to tailor our appeal to him personally. | You stayed focused on his needs here, and that was a good call.

*Conversation plays. Following Juncture #2:* We're starting to see where the customer's needs are. | You analyzed his situation, asked for more clarification, and pointed toward a possible solution at the same time. Great job.

*Conversation plays. Following Juncture #3:* The customer gave you some more information about his finances, and opened up a possibility for you to suggest a new line of business. We're almost ready to present a good solution to him. | You inquired about an area that doesn't represent a direct need for the customer. Try to focus on what is going to address the customer's most immediate and pressing needs or concerns.

*Conversation plays. Following Juncture #4:* Nice. You steered the conversation back to what the customer needs. This is a crucial ability to develop. | And as a bonus, you utilized the "Yes Set" technique. For a refresher on the "Yes Set" technique, click on the red apple icon at the bottom of the page.

*Conversation plays. Following Juncture #5:* Here, the customer agreed with you—and that's always a good thing. | You moved toward presenting a great solution, but you could have

been more assertive. The middle of a conversation is not the point to ask if someone has time to hear more. Just dive right in!

*Conversation plays. Following Juncture #6:* The customer is starting to edge toward the door. Now is the time to decide whether to try another appeal or courteously let him go. | Disciplined perseverance pays. You empathized, addressed the customer's concern, reminded him of why it's a great service, and asked him to reconsider, all in a very quick and concise fashion. You made the right choice here.

*Conversation plays. Following Juncture #7:* The customer is almost ready to close, but he's noncommittal. This is a crucial moment. It's no time to be shy or timid. | You politely ended the conversation. Don't give up! As long as the customer isn't annoyed or impatient, don't be afraid to make another strong appeal. Often that's the one that will close the sale.

### **Summary**

There is more than one way to make a sale. This open-ended module allows a user to experiment with a variety of tactics, and examine the totality of his interaction with a customer. Numerous shorter scenarios will be available for users to concentrate focus on specific moments in the sales process, especially the close. Realistic simulations and detailed feedback will afford users the practice and instruction they need to become effective salespeople.