Interactive Sales Training Curriculum: Mastering Customer Discovery and Product Matching

Course Objective

To improve sales representatives' ability to conduct effective customer discovery meetings and offer appropriate products based on client needs.

Course Curriculum

1. Product Knowledge Workshop (pre-requisite)
    a. Overview of company's product lineup
    b. Matching products to common client needs
2. **Techniques in Customer Discovery**
    a. Importance of understanding client needs
        i. Why it's important
            1. **Tailored Solutions**: By knowing your customer's specific needs, you can offer solutions that are directly relevant to their situation, making your product or service more appealing.
            Example: If you're selling software to a company struggling with time management, highlighting how your tool streamlines tasks and saves time will resonate more than focusing on other features they might not prioritize.
            2. **Building Trust**: Showing empathy and understanding of their challenges builds trust. Customers are more likely to buy from someone who genuinely understands and cares about solving their problems.
            Example: If a small business owner is worried about rising costs, acknowledging that concern and offering cost-effective solutions will make them feel heard and valued.
            3. **Improved Communication**: Knowing pain points allows you to speak the customer's language, using terms and addressing concerns that matter to them. This improves communication and the likelihood of closing the sale.
            Example: If a customer is frustrated with poor customer support from their current provider, you can emphasize how your service offers 24/7 dedicated support.
            4. **Handling Objections**: Understanding their pain points helps you anticipate and handle objections more effectively. You'll be better equipped to explain why your product is a better fit than competitors.
            Example: If a potential customer is worried about a high upfront cost, you can shift the conversation to the long-term savings your product will provide, addressing their cost-related pain point.
            5. **Long-Term Relationships**: Addressing a customer's real needs creates long-term value, making it more likely they'll return for future purchases and even recommend your product or service to others.
            Example: By solving a client's recurring issue with outdated technology, you can position yourself as a trusted partner for future tech upgrades.

__ILT Mod:__ Participants share experiences where misunderstanding a client's needs led to lost sales or opportunities (eLearning: Use survey question with next button showing all course takers answers to reflect on)

   b. Active listening techniques
      i. Define active listening
      ii. Techniques
         1. Paraphrasing and summarizing Example: "So, if I understand correctly, your main challenge is..."
         2. Using verbal and non-verbal cues to show engagement Example: Nodding, maintaining eye contact, and using affirmative sounds like "I see" or "mm-hmm"
   c. Open-ended questioning strategies
      i. Definition and Benefits of open-ended questions
         1. Examples of open-ended questions
         2. Strategy: Using "What," "How," "Why" questions Example: Instead of "Do you need a new monitor?" ask "What challenges are you facing with your current monitors?
   d. Closing Activity Scenario-Based Role-Play: Initial Client Meeting
   e. Introduction to next course in curriculum
3. Advanced Discovery Techniques (online or in-person)
   a. Handling reluctant or difficult clients
   b. Uncovering unstated needs
   c. Reading non-verbal cues
4. Coaching Activity (mentor section): Analyzing Client Needs
   a. Participants review a fictional detailed client profile with a Senior seller
   b. Group discussion on potential solutions
   c. Presenting and defending product recommendations
   d. Develop personal action plans
5. Final Scenario (mentor observation): End-to-End Sales Process
   a. Participants conduct a full discovery meeting with client while mentor observes
   b. Develop and present a tailored solution to client
   c. Handle objections and close the sale
   d. Debrief and Action Planning with mentor
   e. Review key learnings with mentor
   f. Set goals for implementing new skills

Assessment

- Continuous evaluation through role-play and case study performance
- Peer and mentor feedback
- Self-assessment of skills before and after the course

Follow-up

- 30-day check-in to review progress on action plans
- Ongoing mentoring and coaching opportunities