

Design Document

Training Title: BrickKicker Client Care Training

Business Goal and Problem	The BrickKicker provides home inspections and ancillary services to home buyers. These are scheduled either by the buyer or the buyer's agent. The goal is to increase the close rate on incoming calls from 60% to 80% over a 3 month period. The current close rate is low due to incomplete information gathered from customers and the inability to relay the value of the product to customers consistently. Client Care Coordinators are not asking the right questions or getting the right information to callers to sell them on the value of the services.
Target Audience	There are 3 Client Care Coordinators, all female, age range 25-50. Two are fully remote. They are proficient at using the scheduling software. They are knowledgeable about the services offered and determining pricing, but need retraining on how to best sell the services.
Learning Objectives	<p>Terminal LOs:</p> <ul style="list-style-type: none">• Obtain useful information from the caller• Tailor the sales pitch to the caller's needs or concerns• State the price quote appropriately• Overcome price objections during a call <p>Enabling LOs:</p> <ul style="list-style-type: none">• Understand which questions to ask• Listen for useful information• Be able to explain all the services offered• Understand what buyers vs. agents are looking for• Be able to respond differently to buyers vs. agents• Emphasize the value of the services at every opportunity
Training Recommendation	<p>Delivery Method:</p> <ul style="list-style-type: none">• Articulate Storyline e-learning course• Job aid with scripts for describing the services offered<ul style="list-style-type: none">◦ It is not necessary (and would be difficult) for the learners to memorize scripts <p>Approach:</p> <ul style="list-style-type: none">• Scenario-based<ul style="list-style-type: none">◦ One long scenario for dealing with buyers◦ One short scenario for dealing with agents
Training	25 minutes

Time	
Deliverables	<ul style="list-style-type: none"> • Storyboard with script • Job aid • Source file (.story) eLearning course developed in Articulate Storyline with voice over narration • Published SCORM files (.zip)
Training Outline	<p>Welcome</p> <p>Navigation</p> <p>Learning Objectives</p> <p>Scenario 1</p> <p>Obtaining useful information from a caller</p> <ul style="list-style-type: none"> • Buyer or agent? • What are their biggest concerns? <p>Responding to buyers' concerns</p> <ul style="list-style-type: none"> • Price • Roof • Plumbing • Termites <p>Building value for buyers by describing included services</p> <ul style="list-style-type: none"> • Complete Roof to foundation inspection • Infrared thermography for detecting plumbing leaks • Free Termite inspection • Same-day reporting • Inspector assistance after the inspection • Lifetime digital Homebinder subscription • Free trial of a full home warranty • Buyer protection program • 200% money back guarantee • Monthly appliance recall service • Discount on annual property inspections <p>Knowledge Check</p> <p>Staying on track</p> <ul style="list-style-type: none"> • Possible responses for an impatient or frustrated caller <p>Ancillary services: when to offer them</p> <ul style="list-style-type: none"> • Radon • Sewer • Detached building • Asbestos • Mold/Indoor air quality

- MFD foundation
- Lead
- Well
- Pool
- EIFS/Stucco

Knowledge check

Scenario 2

What to offer if a caller is an agent

- RPMax
- Digital Homebinder co-branding
- Inspection report tools
 - If new agent, tell about all 3 services
 - If repeat agent, remind of 1 service

Knowledge check

Scenario 1 Continued

Quoting the price

- Never use “hundreds” or “dollars” when quoting a price
- Never add up the total unless asked
- Always use “hundreds” or “dollars” when talking about discounts

Overcoming price objections

- “It’s too much”
- “I got a lower quote from another company”
- “I need to ask my spouse”

Summary

Quiz

Conclusion

Assessment Plan

Level 2 Assessment:

- Knowledge checks of enabling LOs
- Scenario-based final quiz of terminal LOs
 - 5 questions
 - 80% passing score
 - Opportunity to review answers with feedback after quiz is submitted
 - Unlimited retakes

Level 3 Assessment:

- Observation of 3 calls per learner over a 3 month period
 - Manager assessment using a rubric

- Learner self-assessment using a checklist
- Measurement of close rate after 3 months