

The Outbound Call

Trainer's Manual

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FOREWARD

This program is designed as a half-day group 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 time schedule we have provided 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 this manual and the video.

You have been supplied with master copies of OHT's 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 or computer projection system

Monitor and VCR player

A whiteboard with markers and eraser

Note paper and pens or pencils for participants

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SYNOPSIS

THE OUTBOUND CALL

Isaac Jones works in a busy insurance company call centre. 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 Mudgee Tugboat Company. 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 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 and 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 Mudgee Tugboat Company and surprisingly another introduction to the notorious Franco.

Featuring

Isaac	Guy O'Donnell
Danielle	Tiffany Welden-Iley
Franco	Brendon Rock
Angry Landlord	Ron Bollman

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COURSE STRUCTURE AND RUNNING TIME

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

COURSE WORK	RUNNING TIME
Part 1. Welcome	15 minutes
Objectives & Agenda	10 minutes
Introduction	25 minutes
Part 2. Video & Discussion	35 minutes
Break	10 minutes
Part 3. Facilitator led discussion	30 minutes
Part 4. Activity 1. Call Objectives	10 minutes
Activity 2. Call Guide	15 minutes
Activity 3. The Gatekeeper	10 minutes
Activity 4. Products & Benefits	15 minutes
Activity 5. True or False	25 minutes
Part 5. Summary and Debrief	40 minutes

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PART 1**WELCOME AND INTRODUCTION****15 minutes**

- Welcome all participants to *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 for, when the video will be shown, when breaks will be taken, what refreshments are available and where the phone and rest rooms are.

OBJECTIVES AND AGENDA**10 minutes**

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.

OHT #1

After completing the training session on *The Outbound Call*, participants 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

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INTRODUCTION**15 minutes**

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.

Notes

The outbound call is a way to increase sales and/or 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 dollars 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 annoying interruptions to their busy lives.

OHT#2

The aim of a successful call is to:

- Initially establish a rapport.
- Engage the prospect in a need's analysis.
- Offer a solution.
- Close the sale or complete the objective of the call.

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PART 2

THE VIDEO

Play the video The Outbound Call 15 minutes

Lead a short discussion around the video 15 minutes

Facilitator's suggestions: -

- Have you ever had any experiences like those of Isaac, (either as a customer or as a call centre 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?

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PART 3

Using the overhead transparencies and your own notes continue to lead the discussion encouraging participants to ask questions as you go.

25 minutes

The outbound caller will always have at least two objectives:

- A primary objective - what he or she hopes to achieve from the call
- 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

OHT #3

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.

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

OHT#4

RULES FOR SETTING OBJECTIVES

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

OHT#5

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. Therefore you must 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.

OHT #6**RULES FOR THE DEALING WITH 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 him or her 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.

OHT#7

- 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.

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OHT#8

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.

OHT#9

- Sign off with service.

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

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PART 4

ACTIVITY 1

10 minutes

Call Objectives

- 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. eg 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

15 minutes

Call Guide

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

Facilitator's 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.

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ACTIVITY 3

10 minutes

The Gatekeeper

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

Facilitator's suggestions:

Do's

- 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 whom 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 be misleading or manipulative.

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ACTIVITY 4

15 minutes

Products & Benefits

- Ask participants to complete "the product verses the problem it might solve" H/O #1
- Go through the responses on the whiteboard and discuss the differences between products, features and benefits.

H/O #1

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 claws.
Tyres	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.

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ACTIVITY 5

25 minutes

True or False?

- Ask participants to complete the "True or False" handout.

H/O # 2

- Go through the handout and discuss the answers. Address any queries the group may have.

Facilitator's copy: -

TRUE OR FALSE TEST?

Decide weather or not the following statements are true or false.

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 an initially curt response.	True

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If the caller is upset about you 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 try to sell them a product or services.	True
Sign off the call by thanking the customer for their time.	False

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PART 5

SUMMARY & DEBRIEF

40 minutes

- Play the Video again.
- Go through some of the training points highlighted in the video using the OHT's.
- Ask for and answer any questions that participants may have.
- Let participants know if and when any follow up training will be conducted.
- Give participants a copy of the Summary Sheet **H/O #3**.

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PARTICIPANT HANDOUT MASTERS

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

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TRUE OR FALSE TEST?

Decide whether or not 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 an initially curt response.	
If the caller is upset about you 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 try to sell them a product or services.	
Sign off the call by thanking the customer for their time.	

Summary of Training

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, apologise and thank them for their time.

Fear of rejection is real. When you are suffering call rejection, recognise 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 organisation.

OVERHEAD TRANSPARENCY MASTERS

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OBJECTIVES & AGENDA

After completing this training course you will understand: -

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

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The aim of a successful call is to:

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

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PRIMARY OBJECTIVE

What you hope to achieve from
the call

SECONDARY OBJECTIVE

Leave a positive impression of
your organisation

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RULES FOR SETTING OBJECTIVES

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

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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

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RULES FOR THE GATEKEEPER

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

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Ask permission to go forward

Remain polite

Apologise

Thank them for their time

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CALL RELUCTANCE

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

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Sign off with service

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