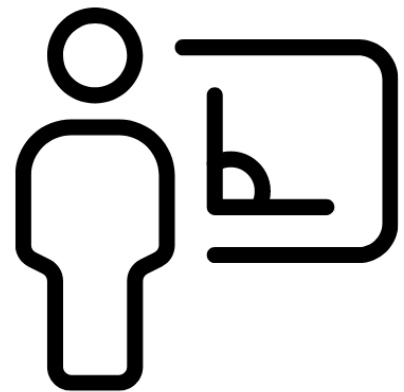


Instructors Guide



On the following pages is a sample module from our Instructor Guide. It provides the instructor with a copy of the material and a Lesson Plans box.

The key benefit for the trainer is the Lesson Plan box. It provides a standardized set of tools to assist the instructor for each lesson. The Lesson Plan box gives an estimated time to complete the lesson, any materials that are needed for the lesson, recommended activities, and additional points to assist in delivering the lessons such as Stories to Share and Delivery Tips.



Sales are contingent on the attitude of the salesman, not the attitude of the prospect.

William Clement

Module Two: Prospecting



Prospecting is essential to any sales endeavor, but is often overlooked or poorly implemented. In order for prospecting to be successful, it is essential that it become both a priority and a habit. Additionally, it is essential that you understand your prospect and choose your methods of communication appropriately. Implementing these steps will help to improve prospecting results.

Make It a Priority



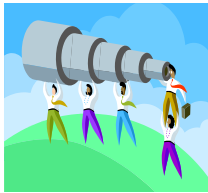
Although everyone knows that prospecting is important to the success of any company that relies on sales, it rarely becomes a priority. It is often put off in favor of tasks that provide instant gratification. Prospecting must become a priority. This requires:

- **Scheduling:** Choose a time for prospecting. Many experts advise people to schedule prospecting early in the day, but you need to choose the time that is effective for you and your prospects
- **Preparation:** Prepare what you will say ahead of time, but be flexible. Do not simply read a script.
- **Professionalism:** Remain professional throughout the process. Do not allow a negative attitude towards prospecting affect your communication.

Estimated Time	8 minutes
Topic Objective	Introduce how to make prospecting a priority.
Topic Summary	Make It a Priority

	Discuss the importance of prospecting.
Materials Required	Flipchart/board and marker
Planning Checklist	None
Recommended Activity	As a group, discuss when you choose to work on prospecting. Make a list on the flipchart/board of times that people have found to be effective. Additionally, share preparation techniques and list these ideas on the flipchart/board.
Stories to Share	Share any personal or relevant stories.
Delivery Tips	Encourage everyone to participate.
Review Questions	What is required in order to make the prospecting a priority?

Identify Your Ideal Prospect



Prospecting is time consuming, which is why it is necessary to identify ideal prospects before beginning the process. Your ideal prospect is your ideal customer. Your company is able to fulfill the needs and wants of your ideal customer. Conduct research to determine who benefits from your product. The information that you must find beyond how your product meets client needs includes the following:

- Values and priorities
- Budgets
- Age
- Gender
- Buying habits
- Profession
- Interests

Once you have identified the ideal customer, you will be able to focus time on prospects who are likely to become your customers.

Estimated Time	8 minutes
Topic Objective	Introduce ideal prospects.
Topic Summary	Identify Your Ideal Prospect

	Explore creative problem solving.
Materials Required	Worksheet 1: Ideal
Planning Checklist	None
Recommended Activity	Complete the worksheet individually. Share your answers with the rest of the class.
Stories to Share	Share any personal relevant stories.
Delivery Tips	Encourage everyone to participate.
Review Questions	Who is the ideal prospect?

Choose Prospecting Methods



There are numerous prospecting methods available, and we will cover them in greater depth in a later module. While you will probably choose multiple methods of prospecting, you must focus your energy on methods that your prospects will respond to when they are exposed to them. For example, younger prospects are less likely to respond to cold calling and more likely to respond to social networking and webinars. Prospecting methods that are commonly used include:

- Cold calling
- Referrals
- Content marketing
- Email marketing
- Networking
- Seminars
- Social networking
- Webinars
- Advertising

Estimated Time	8 minutes
Topic Objective	Introduce prospecting methods.
Topic Summary	Choose Prospecting Methods Consider the different prospecting methods.

Materials Required	Flipchart/board and marker
Planning Checklist	None
Recommended Activity	As a group, discuss your experiences using the different prospecting methods. List each method on the board along with the pros and cons of each.
Stories to Share	Share any personal, relevant stories.
Delivery Tips	Encourage everyone to participate.
Review Questions	How many prospecting methods are used at a time?

Make It a Habit



It is not enough for prospecting to become a priority; it needs to become a habit. There is a common misconception that habits are easily made within 21 days. Recent studies, however, show that it takes roughly 66 to 200 days. When you first decide to make a new habit, the first few days are easy. After the honeymoon phase ends, it is easy to become disillusioned and fall back into old habits. When this happens, it is important to focus on the positive outcomes and follow your schedule of prospecting activities. After struggling through this phase, prospecting will become second nature. In order to truly make prospecting a habit, you need to ensure that you are working at it daily.

Estimated Time	7 minutes
Topic Objective	Consider habits.
Topic Summary	Make It a Habit Discuss habits.
Materials Required	Worksheet 2: Habit
Planning Checklist	None
Recommended Activity	Complete the worksheet individually. Share your answers with the rest of the class.
Stories to Share	Share any personal, relevant stories.
Delivery Tips	Encourage everyone to participate.

Review Questions	What should prospecting become?
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Practical Illustration



Henry and Jim are both experienced at sales. Jim spends an hour each day prospecting. Henry spends half that time, but he continually makes higher sales than Jim does. Jim is frustrated that so much of his time seems to be wasted. He decides to discuss Henry's strategy with him. Henry explains that he carefully screens people to find prospects that are most likely to become customers. By focusing on ideal prospects, Henry is able to close more sales. Jim realizes that he needs to focus on finding the best prospects rather than spending time contacting people who are unlikely customers.

Estimated Time	5 minutes
Topic Objective	Outline the Prospecting Practical Illustration.
Topic Summary	Practical Illustration Discuss the importance of finding the ideal prospect.
Materials Required	None
Planning Checklist	None
Recommended Activity	Discuss the outcome of the Practical Illustration. How is Henry able to spend less time prospecting and make more sales?
Stories to Share	Share any personal, relevant stories.
Delivery Tips	Encourage everyone to participate.
Review Questions	Who are Henry's prospects?

Module Two: Review Questions

1.) What needs to be avoided in prospecting?

- a) Positivity
- b) Negativity
- c) Written communication
- d) Oral communication

It is important to make sure that you remain positive when prospecting. This improves professionalism and communication.

2.) What is NOT necessary for making prospecting a priority?

- a) Schedule
- b) Professionalism
- c) Preparation
- d) Values

Values are necessary to determine the best prospect. The other answer choices help make prospecting a priority.

3.) What is necessary to find the ideal prospect?

- a) Research
- b) Objectivity
- c) Promotion
- d) All of the above

The ideal prospect requires finding the ideal customer. Research must be done to identify the correct prospect.

4.) When should the ideal prospect be found?

- a) During prospecting
- b) After prospecting
- c) Before prospecting
- d) It does not matter

The ideal prospect should be identified before the prospecting begins. This allows the sales person to focus on prospects who are likely to become customers.

5.) What will determine which type of prospecting methods should be the focus?

- a) Interest
- b) The prospect
- c) Priority
- d) CEO

Different methods are used for different prospects. The prospect will determine the focus of the methods used.

6.) What is less likely to be effective on younger prospects?

- a) Seminars
- b) Webinars
- c) Social media
- d) Cold calling

Cold calling is more effective on older prospects that spend more time talking on the phone. The other answers are more effective for younger prospects.

7.) When is it easier to attempt to make prospecting a habit?

- a) At the beginning
- b) Never
- c) At 21 days
- d) After a week

New habits are always easier to attempt at the beginning. After the honeymoon phase ends, however, the process becomes difficult.

8.) How often should prospecting be done to ensure that a habit forms?

- a) Frequently
- b) Weekly
- c) Daily
- d) It does not matter

Actions that need to become habits should be practiced daily. This will help the action to become a habit.

9.) Prospecting is essential to any _____, but is often overlooked or poorly implemented.?

- a) Business
- b) Sales endeavor
- c) Social media site
- d) Customer

Prospecting is essential to any sales endeavor, but is often overlooked or poorly implemented.

10.) Prospecting rarely becomes a priority, and is often put off in favor of tasks that provide _____.

- a) More money
- b) Instant gratification
- c) Praise
- d) None of the above

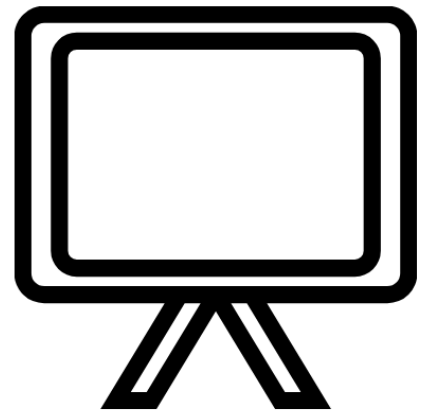
It rarely becomes a priority. It is often put off in favor of tasks that provide instant gratification.

PowerPoint Slides



Below you will find the PowerPoint sample. The slides are based on and created from the Instructor Guide.

PowerPoint slides are a great tool to use during the facilitation of the material; they help to focus on the important points of information presented during the training.



Module Two: Prospecting

Prospecting is essential to any sales endeavor, so it is essential that it becomes both a priority and a habit. Additionally, it is essential that you understand your prospect and choose your methods of communication appropriately. Implementing these steps will help to improve prospecting results.

Sales are contingent on the attitude of the salesman, not the attitude of the prospect.

William Clement Stone

Make It a Priority

- Scheduling
- Preparation
- Professionalism



Identify Your Ideal Prospect

- Values and priorities
- Buying habits
- Interests



Choose Prospecting Method

- Referrals
- Email marketing
- Advertising



Make It a Habit

- 66 to 200 days to make a new habit stick
- Focus on positive outcomes
- Work it daily



Practical Illustration

Henry and Jim are both experienced at sales.



Module Two: Review Questions

1. What needs to be avoided in prospecting?
 - a) Positivity
 - b) Negativity
 - c) Written communication
 - d) Oral communication

2. What is NOT necessary for making prospecting a priority?
 - a) Schedule
 - b) Professionalism
 - c) Preparation
 - d) Values

Module Two: Review Questions

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 - a) Schedule
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 - c) Preparation
 - d) Values

Values are necessary to determine the best prospect. The other answer choices help make prospecting a priority.

Quick Reference Sheets



Below is an example of our Quick Reference Sheets. They are used to provide the participants with a quick way to reference the material after the course has been completed. They can be customized by the trainer to provide the material deemed the most important. They are a way the participants can look back and reference the material at a later date. They are also very useful as a take-away from the workshop when branded. When a participant leaves with a Quick Reference Sheet it provides a great way to promote future business.



Prospecting and Lead Generation Quick Reference Sheet



Choose Prospecting Methods

While there are numerous prospecting methods available, you must focus your energy on methods that your prospects will respond to. For example, younger prospects are less likely to respond to cold calling and more likely to respond to social networking and webinars. Prospecting methods that are commonly used include:

- Cold calling
- Referrals
- Content marketing
- Email marketing
- Networking
- Seminars
- Social networking
- Webinars
- Advertising



Content Creation

Never underestimate the importance of creating impressive content. It must be professional and informative. There are many avenues of content creation, and you can develop it yourself or hire an expert.

Types of Content You Can Create:

- Newsletters
- Case studies
- Blogs/ Vlogs (video blogs)
- Podcasts
- Webinars
- Social media
- Interviews
- Books

Once you have created content, you need to do everything you can to share it. Apply the skills in marketing methods to help spread your knowledge.



Failure to Provide Value

Prospecting and lead generation is often relegated to the sale's pitch. People do not want to feel like they are being forced to listen to an individual who is only interested in their money. Failure to provide value will almost always result in potential customers tuning out your message. Remember to always provide value when you are prospecting and generating leads.



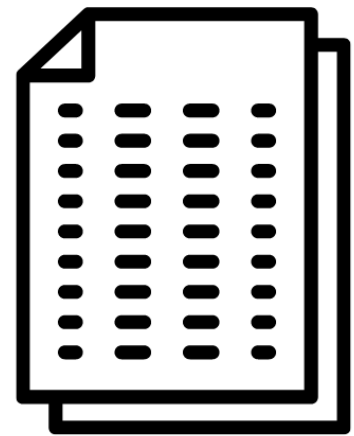
Handouts



Each course is provided with a wide range of worksheets.

Worksheets help check your participants' understanding. If a lesson calls for a worksheet, it will be listed in the Lesson Plan box under Materials Required. All worksheets are customizable and can be found in the Appendix of the Instructor Guide and the Training Manual.

As a trainer, icebreakers give your participants the opportunity to get to know each other better or simply begin the training session on a positive note. Icebreakers promote collaboration, increase engagement, and make your training more light-hearted and fun. Below is an example from the Icebreakers folder.



Worksheet 1

Ideal

In the space, make a list of characteristics of your ideal customer.

This image shows a single sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

Worksheet 2

Habit

Take a few minutes to consider the positive benefits of prospecting. Make a list of benefits that will help you continue when you are tempted to fall back into old habits.

Icebreaker: House of Cards

PURPOSE

1. To help participants get to know each other
2. To identify participants' goals for the session

MATERIALS REQUIRED

3. One playing card per participant, with an equal amount of cards from each suit
4. Several sets of markers
5. Flip chart paper

PREPARATION

Pass out one playing card to each participant, face-down.

ACTIVITY

On your cue, ask participants to turn over their playing cards. They are to find others with their suit, but they are not allowed to talk or show their card. For example, if a person had a spade, they may illustrate that by pretending to dig a hole.

Once participants are in their groups, they are to introduce themselves and come up with a list of five things that they would like to learn during the workshop.

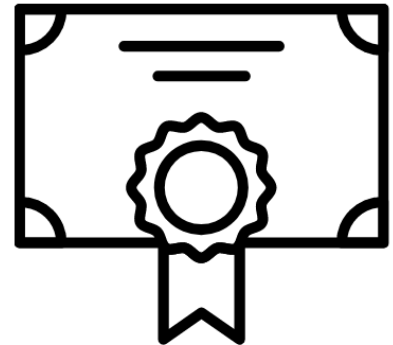
DEBRIEF

Once groups have created their list, bring participants back together. Have each group present their list and combine topics on the flip chart. Use this as a guide during the workshop. If there are any topics that will not be covered, let participants know where they can find more resources (such as follow-up workshops or materials from the Recommended Reading List).

Certificate of Completion



Every course comes with a Certificate of Completion where the participants can be recognized for completing the course. It provides a record of their attendance and to be recognized for their participation in the workshop.



CERTIFICATE OF COMPLETION

[Name]

*Has mastered the course
Prospecting and Lead Generation*

Awarded this _____ day of _____, 20____

Presenter Name and Title
