

Sales Strategy for a Candid Presentation

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Facilitator Guide

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Notes to Facilitator

This guide is designed to help you manage the information for this module and to help increase consistency during all virtual-led training.

***Duration***

This is a 2 hour and 16 minutes course module (excluding breaks.)

***Materials Needed***

* PowerPoint Slides
* Celebration Video

***Equipment Needed***

* Computer with connection to project PowerPoint slides

Using Slides

You will notice that some of the slides build, and when that happens, it can be difficult for the Facilitator to know when the slide is at its end. To help with that, there is a white or an orange stop sign icon on last build in the top right corner of the slide. On any slide where you don’t see a white or an orange stop sign icon, that means that there is more, and to click again. Also, some slides use the morphing animation, so you will see multiples of those slides. They will not show individually in the presentation.

Temperature Checks

There are Temperature Checks throughout the module. They are used to check for understanding as the participants journey through the course. A copy of the Temperature Checks with answers is at the end of this Facilitator Guide.

Participation Wheel

To reinforce engagement, there is a numbered randomizer at three points in the module. Each participant is assigned a respective number that is noted on the participation wheel.

Session Breaks

Participants are allotted three 30-minute breaks throughout the course.

Quizizz

This is a learning platform where quizzes and other learning activities can be completed. This platform provides live or self-paced activities with the results being displayed on a leaderboard. Quizizz will be used to administer the final quiz for this course, which will be used to record attendance.

Module “At-A-Glance”

The timing in this guide is provided as a guideline and is estimated for an average class size of 30; modify as needed.

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| Topic | Activity | Duration |
| Introduction/Welcome | * Participants engage in an icebreaker that requires them   to choose a theme song that would play as they enter  a sales presentation. | 6 mins |
| Session Agenda | Facilitator reviews the session agenda with participants. | 2 mins |
| Training Norms | * Facilitator reviews the training norms with participants. | 2 mins |
| Our Company | * Facilitator reviews the company’s history with participants. | 5 mins |
| Accomplishments | * Participants celebrate their accomplishments. | 5 mins |
| Learning Objectives | * Facilitator reviews the learning objectives with participants. | 5 mins |
| Overpromise and Under-deliver | * Participants provide a definition for the phrase: overpromise and under-deliver. * Using the Padlet tool, participants are prompted to answer the question: What does the phrase "overpromise and under-deliver" mean to you? * Participants review and discuss the customer survey results and explain why it matters. * Participants collaborate with peers and develop solutions to bad reviews in a Google Slide. | 30 mins |
| 5 Presenting Strategies | * Participants review key strategies for presenting products to customers. * Participants discuss and review the do’s and don’ts of each presenting strategy. * Participants complete a matching activity where they match each strategy to its definition. | 30 mins |
| Misleading vs. Non-Misleading Behavior | * Participants review examples of misleading and non-misleading behaviors. * Participants analyze a case study and determine: Which of the 5 presentation strategies could have benefited the company most? | 30 mins |
| Conclusion | * Participants complete a quiz and a session survey. | 15 mins |
|  | Approximate time | 130 mins |

Introduction

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| Welcome | **Slide 1**  **Display** slide.  **Welcome** participants. |  |
|  | **Slide 2**  **Display** slide.  **Provide** the following materials and explain their purposes.  **Click and Explain** the Icebreaker:  **SAY:**  *To ensure we give everyone a chance to join, there is an icebreaker on the screen to get you started. Follow the link provided in chat to complete the activity located on the Google Slide. Once you click the link, look for your assigned number that was sent to you as a direct message. Once everyone responds we will proceed. Make sure you are adding your submission to the correct number. Once you submit, return here to discuss. You will have 6 minutes, starting now.*  **Producer Notes:**   * **Assign and Direct** message each participant a number upon entering the session. * **Paste** the Google Slide for participants to submit their response in the chat box. * [Theme Song: Google Slide Link](https://docs.google.com/presentation/d/1O2DKnXT37I6OvBQyWeCyusPXK9hxr2WRZUlBru9dEoU/edit?usp=sharing) |  |
| Participation Wheel I | **Slide 3**  **Display** Participation Wheel  **Click** to spinthe wheel to select a participant to share and explain why the song was chosen.  **Play** 30-45 seconds of the song for the participants to enjoy.  **SAY:**  *Each of you provided a song that serves as the background music for your sales presentation. I am now going to randomly choose someone to share the reasoning behind your choice. Don't worry, throughout this presentation many of you will be chosen to share.*  **Producer Notes:**   * **Assign and Direct** message each participant a number upon entering the session. * **Paste** the Google Slide for participants to submit their response in the chat box**.** |  |
| Agenda | **Slide 4**  **Display** the Agenda slide.  **Click** to initiate the slide.  **Review** the Agenda. |  |
| Training Norms | **Slide 5**  **Display** the Training Norms slide.  **Review** the Training Norms.  **SAY:**  *On the screen you can view this session's norms.*  *To ensure you that this is a productive session, I encourage you first, minimize all distractions. This can involve turning off your cell phone, leaving messengers like Slack inactive, or even picking a room in your house that is peaceful and free of distractions. Most importantly, be ready to participate and contribute to the conversation. Use the "hand raise" option to interact when you have a question or want to make a statement. Since virtual training can occasionally feel isolated, I encourage you to turn on your webcams to foster a more social environment. Also, maintain open channels of communication as well. You can send Jennifer, who will be helping me, or me, your facilitator, a brief direct message over the chat if you need to take a break. Don't forget to mute your microphones while not speaking. Finally, please return promptly from scheduled breaks. I'm looking forward to spending the day with you all, and I hope this training helps your sales team develop.* |  |
| Our Company | **Slides 6-13**  **Display** the Our Company slide.  **Click and Review** the company’s history.  **SAY:**  *Home Solutions had modest beginnings, with Holman and Carter operating as the company's CEO, CFO, front desk reception, marketing staff, and of course sales team as a two-person operation.*  ***[CLICK]*** *May 2020 - Home Solutions is created by Jeff Holman and Stephanie Carter in Stephanie's garage.*  ***[CLICK]*** *January 2021 - In 9 short months, Home Solutions reaches $100K in sales, reaching a 20% net profit margin.*  ***[CLICK]*** *February 2021 - Home Solutions adds 3 sales representatives for door-to-door sales.*  ***[CLICK]*** *January 2022 - Home solutions opens its marquee store in the Galleria area of Houston, Texas.*  ***[CLICK]*** *June 2022 - Home Solutions ranked as one of the top home goods companies.*  ***[CLICK]*** *Today, Home Solutions has grown to 75 dedicated, devoted employees.*  ***Note: This is a slide that morphs (behaves as one***  ***slide.) Slides 7-13 will not be displayed individually.*** |  |
| Accomplishments | **Slide 14**  **Display** the Accomplishments slide.  **Review** the sales team’s accomplishments.  **SAY:**  *In just two short years, Home Solutions has rapidly expanded thanks to a group of people who share two dreamers' faith in their vision. As a sales team, take note of the following important achievements:*  ***[CLICK]*** *Since 2022, our number of salespeople has climbed by more than 50%, to 30 people.*  ***[CLICK]*** *In the fourth quarter, increased sales led to 55% more in brand-new revenue.*  ***[CLICK]*** *A new product's sales conversion rate of 42% is 32% higher than the lead conversion rate that was anticipated.*  *Holman and Carter appreciate your efforts and commitment to making us successful. Take the time celebrate your contributions to Holman and Carter's success.*  **Producer Notes:**  **Cue** video displaying still shots of Holman and Carter's sales staff at the office, in meetings, making calls, company events, etc. |  |
| Learning Objectives | **Slide 15**  **Display** the Learning Objectives slide.  **Click** to reviewthe Learning Objectives.  **SAY:**  *Despite our exponential growth, we must constantly look for ways to enhance our existing performance. In this session, we'll focus on three crucial ideas.*   1. ***[CLICK]*** *We shall begin by defining the phrase "overpromise and under-deliver."* 2. ***[CLICK]*** *Next, we'll list the most effective methods for introducing new products to clients.* 3. ***[CLICK]*** *Finally, we will choose the appropriate option to avoid deceiving customers.* |  |
| Session Break I | **Slide 16**  **Display** the Take a Break slide.  **Click** to playthe video countdown for a 10-minute break.  **SAY:**  *Let's take a brief 10-minute break. And when we return, we will discuss the Saying overpromising and under-delivering. We'll see you back here in 10 minutes.*  **Producer Notes:**   * **Select** three songs from the icebreaker submissions. * Both during the break and when the participants return to the session, these songs will be played. * This song will be continue playing when spinning the participation wheel. |  |
| Participation Wheel I | **Slide 17**  **Display** Participation Wheel  **Click** to spinthe wheel to select a participant to share and explain why the song was chosen.  **SAY:**  *You each provided a song that serves as the background music for your sales presentation. I am now going to randomly choose someone to share the reasoning behind your choice. Don't worry, throughout this presentation many of you will be chosen to share.*  **Play** 30-45 seconds of the song for the participants to enjoy |  |
| Temperature Check I | **Slide 18**  **Display** Temperature Check slide.  **Explain** the directions the purpose for the temperature check.  **SAY:**  *Let's take a quick poll to check for understanding. Follow the links provided in the chat. If you are using a mobile device, Text TECHSOLUTIONS822 to 22333 once to join.*  *Answer the presented question.*  **Producer Notes:**   * **Ensure** that the poll is activated in the Poll Everywhere App. * **Paste** the poll link in the chat box. * [Poll Link I](https://PollEv.com/multiple_choice_polls/FAGBHTwTyeOwG64EVe5Nc/respond%20) **(Which of the following is an objective we will explore in today's session?)**   **ANSWER:** The answer is A. Refer to slide 15 to remind participants of the correct answer. |  |

Overpromise and Under-deliver

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| The Phrase | **Slide 19**  **Display** question slide.  **SAY:**  *Welcome back! We will now discuss the phrase overpromise and under-deliver. But first, I want you think about the prompt displayed on the screen. Please read the prompt and then click the link in the chat box to include your response. Once you open the link, at the top of the Padlet you will see a prompt. Click the + sign in the bottom right corner to open a drop window will open. There you will respond to the prompt. Once you have completed your response click the submit button in the top right corner. Be prepared to discuss when this activity is complete.*  **Producer Notes:**   * **Paste** the Padlet link in the chat box. * [Padlet Link](https://padlet.com/instructionaldesign11/b7oy3d8e4rxl4rii) **(What does the phrase “overpromise and under-deliver mean?”** |  |
| Customer Survey Results | **Slide 20**  **Display and Review** the Customer Survey Results.  **Click** to reveal each data point.  **SAY:**  *So why is the phrase "overpromise and underdeliver" the focus of our training. Even though we have experienced exponential expansion, client satisfaction has dropped recently. Negative reviews are currently on the rise regarding our new product line, which is costing Home Solutions both new and repeat business. According to financeguru.com, three negative reviews may drive away as much as 60% of customers: four or more, 70%.*  ***[CLICK]****Here at Home Solutions, we are averaging 3 out of 4 new customers who are mildly satisfied, and 1 out of 4 new customers are highly dissatisfied.*  ***[CLICK]*** *Based on the data, less than 1 percent of our customers are extremely satisfied with our new products.*  *Not only are they dissatisfied, but they are voicing their disdain by submitting reviews onto multiple platforms.* |  |
| What the Reviews SAY | **Slides 21-24**  **Display** the What the Reviews SAY slide.  **SAY:**  *Now, let's see what the reviews are Saying.*  ***[CLICK]*** *Take a moment to read what Candace Tee’s review.*   * *Then decide how we overpromised and under-delivered each customer.* * *In the chat box, type the similarities or differences between each review.*   ***[CLICK]*** *Take a moment to read what Amir Bhatt’s review.*   * *Then decide how we overpromised and under-delivered each customer.* * *In the chat box, type the similarities or differences between each review.*   ***[CLICK]*** *Take a moment to read what David Michaels’ review.*   * *Then decide how we overpromised and under-delivered each customer.* * *In the chat box, type the similarities or differences between each review.*   We will spend about 10 minutes on this activity.  ***Note: This is a slide that morphs (behaves as one***  ***slide.) Slides 21-24 will not be displayed individually.*** |  |
| So why does it matter? | **Slide 25**  **Display** slide.  **SAY:**  *So why do unfavorable reviews matter?*  ***[CLICK]*** *Lack of Credibility*  ***[CLICK]*** *Loss of future customers*  ***[CLICK]*** *Reputational damage*  ***[CLICK]*** *Decrease in revenue*  ***[CLICK]*** *Loss of working capital*  ***[CLICK]*** *Chance for redemption* |  |
| Breakout Room Assignments | **Slide 26**  **Display** Breakout Rooms slide.  **SAY:**  *Now that you are aware of what customers are SAYing, let's work to find solutions to each of their issues to repair our reputation. In the chat box is a link to the Google Slide where you will collaborate with your peers to develop a solution to a bad review. Please read the directions carefully before beginning the activity. Please be prepared to discuss when you return to the main lobby.*  **Producer Notes:**   * **Ensure** that each participant has been placed in a group for the breakout rooms. * **Paste** the Google slide document in the chat box for participants to collaborate. * **Review** submissions to gauge understanding. (Facilitator included)   [*What the Reviews Say: Google Slide Link*](https://docs.google.com/presentation/d/1J03RZwzdEuapMZveHlOG01KCfDp2pR1UYUONLG9aGOw/edit?usp=sharing) |  |
| Session Break II | **Slide 27**  **Display** the Take a Break slide.  **Click** to playthe video countdown for a 10-minute break.  **SAY:**  *Let's take a brief 10-minute break. And when we return, we will discuss the SAYing overpromising and under-delivering. We'll see you back here in 10 minutes.*  **Producer Notes:**   * **Select** ONE of the three songs you gathered earlier in the course. * Both during the break and when the participants return to the session, this song will be played. * This song will be continue playing when spinning the participation wheel. |  |
| PARTICIPATION WHEEL II | **Slide 28**  **Display** Participation Wheel  **Click** to spinthe wheel to select a participant to share and explain why the song was chosen.  **SAY:**  *You each provided a song that serves as the background music for your sales presentation. I am now going to randomly choose someone to share the reasoning behind your choice. Don't worry, throughout this presentation many of you will be chosen to share.*  **Play** 30-45 seconds of the song for the participants to enjoy |  |

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| Temperature  Check II | **Slide 29**  **Display** the Temperature Check slide.  **SAY:**  *Let's take a quick poll to check for understanding. In this activity, you will be creating a word cloud. Follow the links provided in the chat. If you are using a mobile device, and have not already joined, Text TECHSOLUTIONS822 to 22333. Answer the presented question.*  **Producer Notes:**   * **Ensure** that the poll is activated in the Poll Everywhere App. * **Paste** the poll link in the chat box. * [Poll Link II](https://PollEv.com/free_text_polls/Jz4dWmHXzFGKpwlR01JyK/respond) **(In one word, what does the phrase "overpromise and under-deliver" mean to you?)** * Snip a copy of the word cloud to be presented for discussion.   **ANSWER:** Answer will vary. Possible responses:   * Dishonest * Self-serving * Zealous * Misinformed * Deceitful * Unscrupulous * Irresponsible * Ambitious |  |

5 Presentation Strategies

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| 5 Presentation Strategies | **Slide 30**  **Display** the Presentation Strategies slide.  **Click** the video to play.  **SAY:**  *Having your products and services appeal to customers is a key aspect of becoming a great salesperson. It's crucial to persuade them that your products are worthwhile and that getting them would make their lives better. But you need to be able to find a balance. Prospective customers must be persuaded, but you must be careful not to trick them into making an unintended purchase. We'll examine five essential strategies for presenting products to prospective customers without misleading them. But first, watch this video and pay close attention to the questions that appear on the screen. When complete, be prepared to discuss.* |  |
| 5 Presentation Strategies: The Do’s and Don’ts | **Slides 31-37**  **Display** the accordion slide.  **SAY:**  *There are many presentation strategies when presenting a product to a customer. However, today we will focus on 5 key ideas that will benefit our team most. As we review each strategy, consider why these strategies matter?*  *Also, we will discuss some do’s and don’ts for each strategy. Be prepared to discuss your ideas in the chat box.*  **ASK:**   * At the end of each slide, ask the question: Why does strategy matter?   **DO:**   * As participants are adding ideas to the chat box, **acknowledge** their submissions aloud. * **Click** each tab’s title to reveal more information about the 5 presentation strategies.   **SAY:**   * *Now, let's complete a quick matching activity.*   **Producer Notes:**  1. **Paste** the Quizizz link in the chat box.  2. **Go** to the admin page of Quizizz and start a live session for the quiz titled: Definitions and Strategies.  3. **Provide** the participants with the generated code to allow their entry into Quizizz.  Quizizz Enter a Code Landing Page link  https://quizizz.com/join  ***Note: This is a slide that morphs (behaves as one slide.) Slides 30-37 will not be displayed individually.*** |  |
| New Product Line Features | **Slide 38**  **Display** the New Product Line Features slide.  **Discuss** the features with the participants briefly.  **SAY:**  *On the screen you can view the features of our new product line. Take a moment to note the similarities and differences of each item.*  *Use the chat box to direct message a coworker about a feature you didn't know about.*  *Each of you has been emailed the necessary information about our new product line.*  *Please reach out to your sales manager if you have any questions about the material.* |  |
| Session Break III | **Slide 39**  **Display** the Take a Break slide.  **Click** to playthe video countdown for a 10-minute break.  **SAY:**  *Let's take a brief 10-minute break. And when we return, we will discuss the SAYing overpromising and under-delivering. We'll see you back here in 10 minutes.*  **Producer Notes:**   * **Select** ONE of the three songs you gathered earlier in the course. * Both during the break and when the participants return to the session, this song will be played. * This song will be continue playing when spinning the participation wheel. |  |
| Temperature  Check III | **Slide 40**  **Display** the Temperature Check slide.  **SAY:**  *Let's take a quick poll to check for understanding. Follow the links provided in the chat. I If you are using a mobile device, and have not already joined, Text TECHSOLUTIONS822 to 22333. Answer the presented question.*  **Discuss** the key ideas from the word cloud.  Producer Notes:   * Ensure that the poll is activated in the Poll Everywhere App. * Paste the poll link in the chat box. * [Poll link III](https://PollEv.com/multiple_choice_polls/c0QabS4HTEhAgRHVT9FKT/respond) **(Which of the following is NOT a presentation strategy?)**   **ANSWER:** The answer is C. Defining your product features may be apart of Knowing your Product, but it’s not all encompassing. Knowing your product could include the following:   * defining your product features * understanding the pros and cons of the product * describing its best use * demonstrating how to use the product |  |

Misleading and Non-Misleading Behavior

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| Misleading and Non-Misleading Behavior | **Slide 41**  **Display** the Misleading and Non-misleading behavior slide.  **SAY:**  *Now let's discuss how misleading and non-misleading behavior is presented.*  ***[CLICK]*** *Even if a transportation company promises to move freight by air, it really does it via road.*  ***[CLICK]*** *An organization that sells cell phones advertises free weekend calls, but it is not made clear that this offer excludes calls to other networks.*  ***[CLICK]*** *Only a few items may really be supplied at such costs, despite promotions or discounts made by businesses to attract customers.*  ***[CLICK]*** *Puffery = Exaggeration ex: “The best thing since sliced bread.”*  ***[CLICK]*** *Providing evidence to support your selling point.*  ***[CLICK]*** *Avoiding the omission of key information.*  ***[CLICK]*** *Establishing uniform prices for all clients.*  ***[CLICK]*** *Being truthful no matter the outcome.*  *Create a sentence using only emojis to explain a key idea that stood out to you from the slide.*  *Enter your emoji sentence into the chat box.*  *You can tap the Windows key and Period () on Windows to initiate the Emoji exchange.*  **DO:**  As participants are adding ideas to the chat box, acknowledge their submissions aloud. |  |
| Volkswagen Case Study | **Slide 42**  **Display** the Case Study slide.  **SAY:**  *Now we will look at a case study to determine where this company went wrong.*  *Do I have any volunteers who is brave enough to come off mute and read the case study aloud?*  **ASK:**  *After reading this case study, which of the 5 presentation strategies could have benefited the company most? Prove your point with information from the case study. Type your answer in the chat box.*  **Point** out the severity of misleading customers.  As participants are adding ideas to the chat box, acknowledge their submissions aloud. |  |
| Breakout Rooms | **Slide 43**  **Display** the Breakout Room slide.  **SAY:**  *Now that you have witness how one company was affected due to misleading its customers, you will now collaborate with you peers to analyze a case study. Please read the directions on the slides carefully to ensure you are completing the activity correctly.*  **Explain** to the participants that they have been grouped for breakout rooms.    **Producer Notes:**   * Ensure that each participant has been placed in a group for the breakout rooms. * Paste the Google slide document in the chat box for participants to collaborate. * Review submissions to gauge understanding. (Facilitator included) * [Case Studies: Google Slide Link](https://docs.google.com/presentation/d/1nTyuO1-DBwtFQnM0kBgqPUwiXbmDK3QpqNu9uwROfCo/edit?usp=sharing) |  |
| How to Not Mislead Customers | **Slide 44**  **Display** the slide.  **SAY:**  *Customers are the cornerstone of every business, and they have a big impact on product sales as well as brand recognition and loyalty.*  *These essential guidelines must be followed by brands that wish to endure; otherwise, we run the danger of building a brand that will ultimately vanish. That is why it is crucial that we avoid deceiving and misrepresenting our brand while making sales pitches to clients.*  *Consider how to not mislead customers.*  *A link has been posted in the chat box.*  *Once you open the link, at the top of the Padlet you will see a prompt. Click the + sign in the bottom right corner to open a drop window will open. There you will respond to the prompt.*  *Once you have completed your response click the submit button in the top right corner.*  *Be prepared to discuss when this activity is complete.*  **Producer Note:**   * **Paste** the Padlet link in the chat box. * [Padlet Link:](https://padlet.com/instructionaldesign11/yafjmjio4k98js5e) **(How can a sales representative avoid deceiving the customer during a pitch?)** |  |

Conclusion

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| Quiz | **Slide 45**  **Display** the Quiz slide.  **SAY:**  *Now it's time to complete the quiz.*  *The completion of your quiz will be how we track your attendance and provide credit for this session. Once you complete your quiz, please complete the survey to let us know what you thought about the course.*  **Producer Notes:**   * **Paste** the Quizizz link in the chat box. * **Go** to the admin page of Quizizz and start a live session for the quiz titled: Definitions and Strategies. * **Provide** the participants with the generated code to allow their entry into Quizizz. * Quizizz Enter a Code Landing Page link   <https://quizizz.com/join> |  |
| Conclusion | **Slide 46**  **Display** the Conclusion slide.  **SAY:**  *Thank you participating in today’s training.*  *I hope you leave feeling like you have some new, useful tools or that you discovered something new to improve your sales presentation. A Google Form has been placed in the chat box. Please complete the survey.*  *Thank you all for participating in this session.*  **Producer Note:**   * Paste the Google Form into the chat box. * [Session Survey: Google Form link](https://forms.gle/wj6AKNyWWn4ouQNP8) |  |

Platforms

Below you will find a list of all the platforms we will be using in this training. Please be sure to familiarize yourself with these platforms. A Quizizz account will be created and emailed prior to the facilitation of this training.

* Google Slides
* Google Forms
* Padlet
* Quizizz