LEADER INFORMATION

The [training topic] Review is a quick, high-impact activity designed to provide Account Executives the opportunity to refresh their understanding of the different phases in the sales cycle and the outcomes desired for each of those phases. The review is designed so that supervisors can conduct it during regular team meetings.

This Leader Guide is divided into two sections:

1. *Leader Information (this section) – provides the leader with step-by-step instructions for leading any [training topic] Review workshop. If you have previously conducted one of these workshops, you may choose to skip this section and proceed directly to the next section, [training topic] Review.*

   The Leader Information section is divided into five topics:

   A. *Workshop objectives*
   B. *Materials and preparation required*
   C. *Training outline*
   D. *How to use this Leader Guide*
   E. *Summary and Transition*

2. *[training topic] Review – provides the leader with training information and activities to use to conduct this workshop. This section is further divided into four topics:*

   A. *Welcome and Introduction*
   B. *Content Review*
   C. *Practice Opportunity*
   D. *Session Debrief*

Workshop Objectives

Upon completing this session, participants will be able to:

- *Identify the five phases of the sales cycle and the goals for each phase*
- *Determine what makes a good prospect*
- *Ask the right questions to uncover and understand a prospect's needs*
- *Close the sale and gain commitment from the customer*
- *Communicate your findings*
- *Set expectations for the next steps*

Materials And Preparation Required

- *Flipchart and markers*
  - *Prepare pages of the flipchart with the following information (one per page):*
    - ✓ *"Objectives" of the workshop (see Workshop Objectives shown above)*
    - ✓ *"Parking Lot" to collect and acknowledge off-topic concerns of participants*
    - ✓ *"Follow Up Checklist Changes/Additions"*
    - ✓ *"Impactful Value Statements"*

- ✓ *"Other Questions to Ask"*

- *Activity/Scenario Sheets*
  - *[training topic] Role Play Activity*
  - *Post Review Learning Activity (Optional)*
- *Tip Sheets*
  - *Uncovering Your Customer's Needs*
  - *Checklist for Setting Expectations*

Training Outline

Topic	***Trainer Materials***	***Participant Materials***	***Approximate Timing***
Welcome and Introduction	*Flipchart for session "Objectives"* *Flipchart for "Parking Lot" items* *Markers*		*3 minutes*
Content Review	*Flipchart for "Checklist for Setting Expectations Changes/Additions"* *Markers*	*Checklist for Setting Expectations*	*15 minutes*

Topic	***Trainer Materials***	***Participant Materials***	***Approximate Timing***
Practice Opportunity	*Flipchart for "Impactful Value Statements"* *Flipchart for "Other Questions to Ask"* *Markers*	*[training topic] Role Play Activity* *Uncovering Your Customer's Needs Tip Sheet*	*35 minutes*
Session Debrief	*Flipchart for "Parking Lot" items* *Markers*	*Post Review Learning Activity (Optional)*	*5 minutes*
		Total	***58 minutes***

How to Use this Leader Guide

The next section, [training topic] Review, provides the leader with step-by-step instructions on conducting this workshop. There are four major topics found in the [training topic] Review section:

- *A. Welcome and Introduction*
- *B. Content Review*
- *C. Practice Opportunity*
- *D. Session Debrief*

Within each topic are steps that describe how the activity flows. The major steps are numbered while supplementary steps are bulleted. Below is an example of how the Welcome and Introduction topic is presented.

Welcome and Introduction

1. ***Welcome participants.***

   ➢ *Make introductions as appropriate.*

2. ***Provide purpose of workshop.***

   ➢ *Objectives*

OTHER VISUAL CUES USED:

In the right-hand column, you will see text and/or questions you should be saying to or asking the participants during an activity. For example:

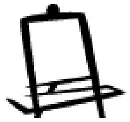
***Say**: "This is what you should say or paraphrase."*

***Ask:** "What question should I ask?"*

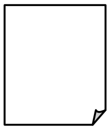
Also in the right-hand column, you will see various icons that will visually help you present the materials. For example:

The runner icon tells you that it's time to start a participant activity.

The easel icon prompts you to refer to your flipchart.



The document icon indicates a handout.



Summary And Transition

Now that you have learned how to use the Leader Guide, you are ready to begin presenting information and activities to the participants. The next section, [training topic] Review, provides you with the tools you need to conduct this workshop.