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Sales and Customer Service Playbook

Your 101 Guide to Creating an Unforgettable and Helpful Experience Throughout the Customer Lifecycle

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Welcome!

Welcome to the Sales and Customer Service Playbook, your guide to training employees on how to “seal the deal” and create long-lasting customer relationships! This comprehensive guide outlines how to train your sales professionals to get their prospects over the finish line and your customer support team to be empathetic and inquisitive to solve your customer’s issues. Through a series of suggested content, group, and individual activities, and skill assessments, your learners will leave this training program with the tools and skills needed to be attentive, communicative, and patient when working with future or current customers.

The recommended content titles referred to in this guide can be found in The BizLibrary Collection. Before the start of your program, we recommend you assign these courses to your learners via your company LMS. This provides your learners with easy access to their content and gives managers valuable reporting data to measure participation and training effectiveness.

BizLMS also offers grouped content in the form of learning initiatives and curated learning paths! These carefully-crafted lists offer additional resources and suggest related content in areas important to your organization’s training goals.

Along with the suggested content, provided in this guide are activities encouraging deep personal reflection and promoting greater information retention. Activities and reflections are useful because they help learners discover the potential and direct impacts of newly-learned information in their lives.

We highly recommend using both the content and activities included in this guide for an optimal training experience. The content and activities can be tailored to your company’s specific needs and are meant as a starting point for training sales and customer service representatives in your organization.

Let’s get started!

Use Case

How can the Sales and Customer Service Playbook equip employees with the skills necessary to outshine competitors throughout the sales process and enable employees to provide helpful solutions to issues that may arise with your product/service?

Picture this: It's 8 am, you open your computer, and of course, the software you need to work for the day is down. You call customer service, and the wait time is already over an hour?! By the time you get patched through the rep is unhelpful, impatient, and rude. Ugh, no thanks!

Or how about you attend a sales demonstration of a product you are really excited about bringing to your organization, but the rep can't answer a single question. You wait for the follow-up email hoping it has the answers you need, but yikes they spelled your name wrong and inserted the wrong business challenge. We already know what you're thinking, SKIP!

We've all been there wishing our experience was better and probably thought a time or two about how we could do it better if we were on the other end of the phone. These scenarios and more are exactly why it's time to throw out the old saying of letting these employees dive head-first and see if they sink or swim. We are willing to bet you'll be calling for a lifeguard (or having your managers step in on customer interactions) more than once.

Organizations need proper in-depth training for employees that are hired into a sales or customer service role beginning on day one. It's time-consuming we know, and you want to get your customer-facing employees up and running ASAP. However, remember **these employees are a potential customer's first interaction with the company or could be the reason a customer renews or churns, so the stakes are high.**

But you may be thinking there is so much that goes into these roles like:

- writing catchy emails to grab prospects' attention,
- being informative yet exciting while on the phones,
- staying up-to-date on product offerings and services,
- remaining polite yet inquisitive to get to the problem at hand, and
- much, much more.

So how will I effectively train employees to make sure all the bases are covered?

Enter the **Sales and Customer Service Playbook.**

This ultimate how-to guide is your blueprint for a homerun sales and customer service training program that will have employees feeling well-equipped to do their jobs successfully!

You may be asking yourself what is included in sales and customer service training, well, let us tell you! Sales training instills a mindset of perseverance, positivity, and deep belief in yourself that you can and will succeed, despite obstacles you may face. In addition, customer service training will allow employees to be customer-oriented, which means putting the customer's needs above everything else by always listening to their challenges while doing what they can to provide solutions.

In this guide, you will:

- Know how to set up your training program to allow your employees to know everything they need to do their job effectively,
- Understand the different business and soft skills needed for employees to thrive as sales or customer support representatives, and
- Receive activity recommendations and an email template to offer or send during your training program.

So, let's dive in! We can't wait to hear about all the success your ***Sales and Customer Service training program*** will bring.

Who? What? Where? When? Why? How? Tips to boost your Sales and Customer Service Training Program.

Who will get the most out of this guide?

This guide is set up to train standout customer service representatives who create great customer experiences when resolving issues and sales representatives who can meet and exceed their quotas.

Also, this guide is for HR and L&D trainers who want to implement transformative training that goes beyond compliance and empowers their learners to learn new skills and improve the ones they have. Organizations with this type of programs statistically have a better company culture, lower turnover, and higher rates of success!

Whose support does your program need?

No matter which program you're trying to implement, it is vital to have the support of C-suite or VP leadership. Here are some key statistics you can use to market your sales and customer service training program to C-suite members:

- 55% of service agents believe they need better training in order to do their job well. *
- 80% of customers say the experience a company provides is as important as its products or services. **
- 91% of customers agree that a positive customer experience makes them more likely to make another purchase. **
- Companies that invest in training are 57% more effective at sales than their competitors.***
- On an individual level, sales training can boost sales representatives' performance by an average of 20%. ****

* State of Service, Salesforce ** State of the Connected Customer, Salesforce *** taskdrive **** spotio

What can you expect to gain from this guide?

From this guide, you can expect learners to become knowledgeable on the products and/or services they are selling or fixing, understand the various de-escalation techniques, effective communicators, and be attentive to the needs of their prospects and customers.

Where should this training take place for optimal success?

The following program is set up to be executed through a combination of mediums- self-study video lessons, coaching exercises, etc. When developing new skills, practicing with others strengthens neuropathways and reprograms less than desirable reflexive responses. Throughout this guide, your learners will be encouraged to participate in group and individual activities that create long-lasting skills.

When should the training be completed?

The following topics are most effective when learners are given 4-6 months to complete the program, spending 3-4 weeks on each stage. Trainers will want to allow time in between topics for their learners to practice what they have learned in their job roles and on their team.

Why does training your sales and customer service representatives matter?

Sales and customer service roles require top talent that is persevering, curious, patient, and positive. When first hired and onboarded most candidates do not have all these qualities but were selected because they show promise to grow and learn. It's critical that when they begin in their new position, they are offered training to not only expand upon their current skills but also perform well to benefit the business. High-quality sales training can lead to higher win rates, higher customer satisfaction, less turnover on the team, and upward mobility with representatives becoming coaches. Furthermore, high-quality customer service training can help with the longevity of the business, but conversely, lack of training can lead to further issue escalation, loss of business, negative social media coverage, and bad reviews on additional sites, as reported by Salesforce.

How can you measure the success of your program?

The Kirkpatrick Model is an excellent resource to consider when creating KPIs for your program. Below are some suggestions on how to incorporate this model into your sales and customer service training program.

1 *Level 1: Reaction, Satisfaction, and Intention.*

- Evaluate the response from learners – specifically, how they felt about the training course materials and activities.
- At this level, you should also measure engagement from your learners. Do you have 100% participation in your events and activities? If not, you may need to reach out to learners for more information on what they need to give the necessary time and attention to the program.

  Some common issues learners face are:

  - not enough allotted time to complete training,
  - excess stress and responsibilities,
  - difficulty with work/life balance, and
  - fear of speaking up when they don't understand a concept

2 *Level 2: Knowledge Retention.*

- Measure how effectively the information was absorbed by your learners. Typically, this is done through testing like the self-assessment template and group role play.
- Fully utilize the self-assessment tool by comparing ratings from each stage.

3 *Level 3: Application and Implementation.*

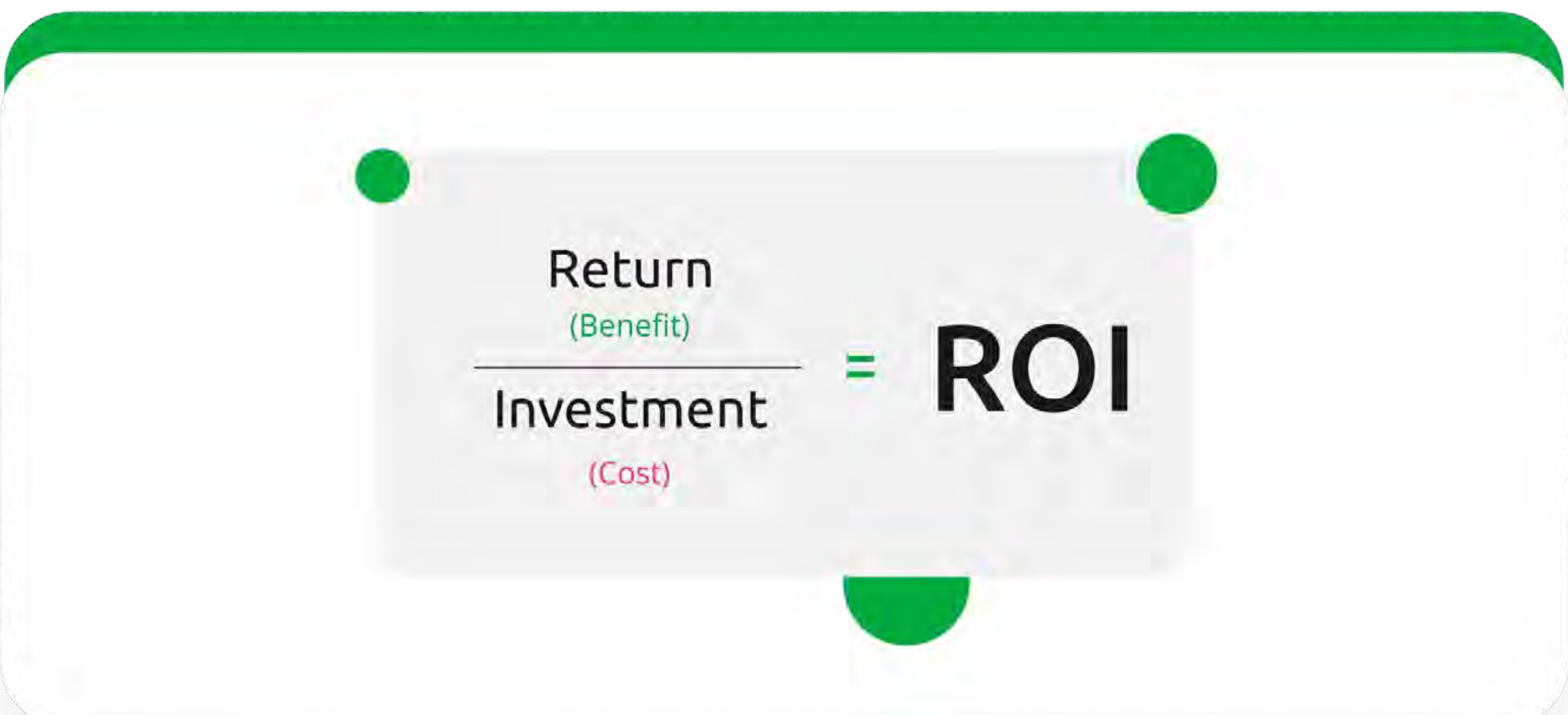
- Measure the degree to which your training has influenced the behavior of the participants, and how they are applying their new knowledge amongst their teams.
- Do not be afraid to engage with your learners' managers and teammates. A great way to do this is by having the trainee's manager listen in on calls and provide ratings before and after training to measure and document noticeable changes in their sales pitch delivery or customer service etiquette.

4 *Level 4: Business Impact.*

- Measure the impact your training has had at the business level and get a clear sense of ROI for your training program. For example, consider tracking improved close rates, faster customer service response time, and a reduction in churn. If you are looking for a deep dive into using the Kirkpatrick Model for evaluating training in your organization, download our free ebook here.
- At this level, you should start seeing measurable results that you can show to your C-Suite and VP-level stakeholders!

5 *Level 5: Return on Investment (ROI) Calculator.*

We have found that ROI is the best way to highlight the success of your program to your stakeholders! Here is a simple formula to help you get started! You can learn more about measuring ROI in our ebook here.



Using this guide for optimal success.

The following topics are designed to be steppingstones to success for creating stand-out sales and customer service representatives in your organization by outlining necessary skills with suggested learning content, followed by individual and group reflections.

We recommend following these topics as outlined in this guide, because, while the concepts overlap, the terminology and insights are designed to build naturally over the length of the program.

A quick outline of each stage can be found below.

1 Topic 1- Soft Skills Needed for Sales Representatives

Featured skills in this topic are:

- Active listening
- Time management
- Critical thinking
- Collaboration
- Written and verbal communication
- Confident
- Adaptable
- Organized
- Negotiation
- Handling rejection
- Relationship building
- Research and information gathering
- Storytelling

Topic 1 addresses soft skills that an individual would need to enhance or acquire to be successful in their sales role.

2 Topic 2- Job Function Knowledge Needed for Sales Representatives

Featured skills in this topic are:

- Product and/or service knowledge
- Software knowledge
- Goal setting
- Prospect qualification — Finding prospects, Cold Calling
- Sales funnel knowledge
- Outlining the sales process to prospects
- Giving a demo
- Writing — Cold emails, Proposals
- Close the deal
- Handoff to client success (This knowledge should come from internal processes and be covered with your learners.)

Topic 2 addresses business skills that an individual would need to be knowledgeable in or learn about to be successful in their sales role.

3 Topic 3- Soft Skills Needed for Customer Service Representatives

Featured skills in this topic are:

- Verbal and written communication
- Patience
- Effectiveness
- Efficiency
- Attention to detail
- Positive
- Active listening
- Empathy

Topic 3 addresses soft skills that an individual would need to enhance or acquire to be successful in their sales role.

4 Topic 4- Job Function Knowledge Needed for Customer Service Representatives

Featured skills in this topic are:

- Product and/or service knowledge
- Software knowledge
- Goal setting
- De-escalation strategy techniques
- Escalation strategy techniques (This knowledge should come from internal processes and be covered with your learners.)
- Opening and closing a support case (This knowledge should come from internal processes and be covered with your learners.)

Topic 4 addresses business skills that an individual would need to be knowledgeable in or learn about to be successful in their sales role.

5 Topic 5 – Coaching Your Sales or Customer Service Representative (Please Note: This topic is intended for managers or leads.)

Learning Outcomes:

- Motivation
- Supporting employees
- Providing feedback
- Help the achievement of goals
- Problem solving
- Escalation strategy techniques

Topic 5 addresses the skills that an individual would need to enhance or acquire to be a successful sales or customer service coach.

Activity Instructions

The activities included in this playbook are designed to function like learning boosters and added everyday-day measures to take your sales and customer support training beyond instructor-led and video training (although that's a great start!). We encourage you to tailor these activities to fit the needs of your organization, adding or changing them based on your unique set of desired business and learning outcomes.

Activity 1 – Pre and Post-Feelings Assessment

Have your learners consider the following questions before they embark on this training course. Encourage them to make a mental note of any areas where they need to improve. Additionally, when the training program concludes, we recommend you resend or ask the questions noting where they went from a lower rating to a higher rating, based on the knowledge they gained. Please note that some are applicable to only sales representatives, and some may only be applicable to customer service representatives.

Using a scale of 1 to 5 where 1 represents Not Agree and 5 represents Agree, rate yourself on the following areas.

Reflect on these ratings as you move through your training program. You can also write down your reasons or thoughts behind each rating as a tool for measuring your progress as you develop and enhance your skills.

a) I am confident I know all there is to know about the product and service offerings at my organization.

b) I am well organized and know how to manage multiple prospects or support cases at one time.

c) I have strong written and verbal communication skills and can clearly articulate the message I am trying to convey.

d) I am a visual storyteller which allows me to be persuasive when working with a prospect to close a deal.

e) I can respond appropriately to rejection.

f) I know how to de-escalate a situation so that my customers feel supported and helped.

g) I know when to escalate a situation to provide my customers adequate support to handle their issues.

h) I am knowledgeable in my organization's support case creation and closing process.

i) I feel well-supported by my coach to overcome obstacles in my role.

j) I feel my coach has outlined goals that leave me motivated to achieve and surpass.

**General note about the above assessment, you may want to ask learners if they have questions specific to certain stages in the sales cycle that they may need further clarification on that they want to hone in on for training or that are most important to the organizations.*

***Note to instructors leading group training*. Consider having employees share a few of their ratings with their group. You might have each person share which of these topics they feel needs the most improvement and why. You could also have them share which topic they feel most prepared for and why. Using this methodology may help some learners process their thoughts and mentally prepare them for upcoming lessons.

Activity 2 – Product / Service Trivia

There are many products and services your organization offers to its customers and keeping track of all the intricacies of those can be difficult for new sales and customer service reps. While you probably have more formal documentation on everything consider expanding upon the handouts or formal training with a knowledge check-in game of trivia! This is a great way to get your new team of representatives warmed up and ready to hit the phones with their expansive product and service knowledge. Oh – and did we mention it's a lot of fun, and a little competition never hurt anybody!

Activity 3 – Sales / Customer Service Mentor Program

When beginning a new role at a new organization it is helpful to learn from those who have been in your shoes. Creating a mentor program specifically for your sales and customer service departments helps new hires absorb and collect information better when frequently discussing any questions or challenges that may occur throughout their training or first few months on the job. Also having someone who looks out for their performance, can help guide them through sticky situations as they arise, and celebrate the new hire's wins can also help retain talent, which is always a plus. When the new hire feels confident in themselves to perform the job well, the mentorship can continue for guidance throughout their tenure at the organization and help assist providing feedback in areas they may need to improve upon to be considered for promotion opportunities.

The following email template can be sent to your learners before training begins as preparation for the upcoming training program. You will want to edit the template pending which role you are sending it to.

At [Company Name] we want to ensure you have the right skills you need to be successful in your role as a sales or customer service representative. Critical thinking, adaptability, patience, and active listening are some of the key skills needed to close deals and help customers.

During this training, you will grow in your own business and soft skills, as well as gain the skills needed to be a stand-out sales or customer service representative. We encourage you to log into [company name's LMS] and briefly review the assigned content videos today.

Before you begin your training courses, take a few minutes, and complete the following self-evaluation to measure your learning as you journey through this program!

Using a scale of 1 to 5 where 5 represents that you do agree and 1 represents that you do not agree, rate yourself on the following areas.

Reflect on these ratings as you move through your training program. You can also write down your reasons or thoughts behind each rating as a tool for measuring your progress as you develop and enhance your skills.

a) I am confident I know all there is to know about the product and service offerings at my organization.

b) I am well organized and know how to manage multiple prospects or support cases at one time.

c) I have strong written and verbal communication skills and can clearly articulate the message I am trying to convey.

d) I am a visual storyteller which allows me to be persuasive when working with a prospect to close a deal.

e) I can respond appropriately to rejection.

f) I know how to de-escalate a situation so that my customers feel supported and helped.

g) I know when to escalate a situation to provide my customers adequate support to handle their issues.

h) I am knowledgeable in my organization's support case creation and closing process.

i) I feel well-supported by my coach to overcome obstacles in my role.

j) I feel my coach has outlined goals that leave me motivated to achieve and surpass.

This training program is designed to provide helpful tools so you can achieve success in your role! We are so excited to walk with you as work through this program at [company name]. Together we will accomplish great things!

[email signature]

1 Topic 1- Soft Skills Needed for Sales Representatives

The following video courses teach:

1. How to become more successful at selling by teaching how to build and maintain trust with customers in order to improve the way they're framing the cost of what they're selling to a customer,
2. Busy salespeople how to efficiently manage their hectic schedule,
3. What critical thinking entails, including the benefits it offers, highlights the key traits critical thinkers possess and points out critical thinking errors learners should avoid to come up with the best solutions possible,
4. A powerful way to HEAL team relationships, appreciate diversity and improve collaboration,
5. How to communicate better on the phones, in their email communications, and provides helpful tips when communicating with customers,
6. The essential skills for providing consistent, high-quality care for every customer,
7. The behaviors, decision-making, and metrics needed for making simplicity the new operating system across your organization, and boost productivity,
8. The three elements that make for successful sales negotiating and discover options for negotiating on value as opposed to just price,
9. The four levels of a sales relationship and how fighting for a Next Set Time helps you build the relationship towards mutual trust and respect—and more business,
10. The differences between qualitative and quantitative research methods and demonstrates those differences by highlighting the tools that are used to conduct each type, and
11. How stories can help you share ideas and gain buy-in from others.

The following courses are just a few of the many titles found in the full BizLibrary Collection. Use these titles as guides to explore more content offerings that align best with your desired learning outcomes.

- ✓ Professional Selling: Listening Effectively
- ✓ Sales Toolkit: Time Management Tips
- ✓ Critical Thinking Overview
- ✓ HEAL for Collaboration
- ✓ Communication Toolkit: Connecting Over the Phone
- ✓ Communication Toolkit: Corresponding via Email
- ✓ Communication Toolkit: Conversing with Customers
- ✓ Communication Toolkit: Communicating with Confidence
- ✓ Service Best Practices: Adaptability
- ✓ Build a Simplification Strategy
- ✓ Negotiating Sales
- ✓ Knock on Lots of Doors: Earn Success Like a Salesperson
- ✓ Competitive Selling: Four Levels of a Sales Relationship
- ✓ Research Methods
- ✓ Communication Toolkit: The Power of Storytelling

2 Topic 2- Job Function Knowledge Needed for Sales Representatives

The following video courses teach:

1. The difference between a salaried sales job and commission and touches on key performance indicators (KPIs) as a roadmap to improve performance and achieve sales goals,
2. How to use critical thinking and questioning techniques to drill down on a prospect's problems and opportunities,
3. A new way of viewing cold calling to help see more success,
4. The process that successful salespeople follow to generate more leads, close more sales, and develop long-lasting relationships with customers regardless of the industry they operate in,
5. Critical tips for crafting an email so that recipients actually want to read it,
6. The elements of an effective proposal and the appropriate time for delivering the proposal to your prospect,
7. The ABC's of sales (hint – it's not Always Be Closing!!!) and how you can differentiate your closing strategy throughout the entire sales cycle.

The following courses are just a few of the many titles found in the full BizLibrary Collection. Use these titles as guides to explore more content offerings that align best with your desired learning outcomes.

- Setting and Managing Your Sales Goals
- Selling Solutions: Identifying Prospect Needs
- Selling Solutions: Pitching to Prospects
- Professional Selling: I Hate Cold Calling!
- Sales Toolkit: The Sales Funnel
- Understanding the Sales Process
- Pitching and Influencing
- Writing More Effective Emails
- Communication Toolkit: Corresponding via Email
- Creating an Effective Sales Proposal
- Understanding the Sales Process: How to Close a Sale
- Expert Insights: Professional Selling with Jim Cathcart
- Competitive Selling

Topic 3- Soft Skills Needed for Customer Service Representatives

The following video courses teach:

1. How to strengthen your ability to listen to your customers,
2. The key qualities you should work on developing to become the best customer service rep you can be,
3. Action steps you should take when working with customers to ensure the process goes smoothly, every time,
4. How being Proactive, Listening, Understanding and Special is the recipe for becoming a PLUS Service Champion,
5. The importance of being an active listener and paying attention to details
6. Actionable steps for dealing with tough situations with customers,
7. How to strengthen your ability to listen to your customers, and
8. How being able to see things from customer's perspective can improve the service you provide.

The following courses are just a few of the many titles found in the full BizLibrary Collection. Use these titles as guides to explore more content offerings that align best with your desired learning outcomes.

- ✓ Customer Service Basics: Listening to Your Customers
- ✓ Customer Service 101: Do You Have What It Takes?
- ✓ Customer Service 101: Steps for Success
- ✓ PLUS Service Champion
- ✓ Service Best Practices: Attentiveness
- ✓ Service Best Practices: Resiliency
- ✓ Customer Service Basics: Listening to Your Customers
- ✓ Service Best Practices: Empathy

4 Topic 4- Job Function Knowledge Needed for Customer Service Representatives

The following video courses teach:

1. How to generate aspirations, organize manageable steps, activate the right attitude, learn new skills and share success, and
2. The key steps in defusing an angry customer from beginning to end, including when to terminate a conversation.

The following courses are just a few of the many titles found in the full BizLibrary Collection. Use these titles as guides to explore more content offerings that align best with your desired learning outcomes.

- ✓ Customer Service 101
- ✓ GOALS to Results
- ✓ Handling Angry Customers
- ✓ Expert Insights: Sparking the Customer Experience with Simon T. Bailey

Topic 5 – Coaching Your Sales or Customer Service Representative

(Please Note: This topic is intended for managers or leads.)

The following video lessons teach:

1. The set of leadership actions you can take to increase motivation and inspire your team,
2. The difference between inspiration and motivation,
3. The four different theories that managers can use when motivating their employees,
4. How to provide the right level of coaching to your customer service representatives,
5. What you need to do as a leader to help shape and direct the customer service needs of the company,
6. How to give feedback to your customer service representatives on their performance,
7. To determine what is required to ensure issues are solved in the right way at the right time,
8. How to define and analyze a problem in order to deliver a high-quality solution and identify the key skills necessary to create a solution using a systematic approach to break down a problem into manageable steps.

The following courses are just a few of the many titles found in the full BizLibrary Collection. Use these titles as guides to explore more content offerings that align best with your desired learning outcomes.

- ✓ Customer Service Management: Inspiring and Motivating Customer Service Agents
- ✓ Motivating Employees Toolkit: Don't Just Lead—Inspire!
- ✓ Motivating Employees Toolkit: Four Theories of Motivation
- ✓ Customer Service Management: Customer Service Coaching
- ✓ Customer Service Management: Shaping the Direction of Customer Service
- ✓ Customer Service Management: Giving Feedback to Your Customer Service Agents
- ✓ Reach Your Goals
- ✓ Managing for Success: Solving Problems in the Right Way
- ✓ LEAD NOW: Problem Solving

Congratulations on completing the Sales and Customer Service Playbook: Your 101 Guide to Creating an Unforgettable and Helpful Experience Throughout the Customer Lifecycle

Once your learners have completed the program send them this follow-up email.

Congratulations [insert name] on completing the Become a Stand-out Sales or Customer Service Representative! We hope you feel better prepared as you continue your [job title] position with [company name].

In this course, you learned how valuable it is to be an effective communicator, negotiator, and problem solver to be the best sales or customer service rep you can be!

Please let us know what you liked most about this course and share any areas you think need improvement.

We are so excited to walk with you as you continue your career journey here at [company name]. Together we will accomplish great things!

Sales and Customer Service Playbook Recap

Now that your learners have completed this in-depth training guide, they have the tools they need to be stand-out sales and customer service representatives!

We would encourage assigning refresher questions of these or related courses every quarter to help learners continue developing their skillset and keep what they have learned throughout this guide top of mind.

We also have several other amazing guides that are available for you to use! Check out:

1. Creating a Culture of Compliance: Your 101 Guide for Building a Robust Compliance Program
2. Diversity, Equity, and Inclusion (DEI) Playbook: Your 101 Guide for Creating a Culture of Belonging and Allyship
3. New Manager Playbook: Your 101 Guide for Training New Managers
4. Onboarding Playbook: Your 101 Guide for Creating an Engaging Experience from Day One with Your New Hires
5. Creating a Safe Workplace Playbook: Your 101 Guide to Keeping Your Employees out of Harm's Way
6. Working Remotely Playbook: Your 101 Guide to Developing a Collaborative Workplace Environment No Matter Where Your Employees Are

As your learning partner, we love hearing how we can better support your training program initiatives.

Need help strategizing KPIs and Business goals?

Developing KPIs is important to measuring growth, but knowing the what, where, and how's can be hard. Your BizLibrary Client Success Manager is ready to walk through these steps with you to ensure you have the right targets in place to measure success in meaningful ways.

If you have feedback or suggestions on how we can help prepare your learners in their roles, or how we can partner with you in other areas of your training programs, send a message to your Client Success Manager.

Did you know BizLibrary has a Skills Development Platform that can streamline training across your organization?

We understand the importance of having a great training program, and we know how hard designing and implementing a program for multiple learners across departments can be.

As your partner, we are always looking for ways to enhance your program. Our newest BizLibrary product is a skills development platform designed to take the guesswork (and gruntwork!) out of curriculum development, and expertly scale personalized learning experiences throughout your organization!

BizSkills is the first and only off-the-shelf upskilling platform that provides your workforce with personalized training and career growth for each unique employee.

Request a free personal consultation or check out our most recent video demonstration here! You can also find more information on BizSkills by visiting our website www.bizlibrary.com!

Already using BizSkills? **You're a rockstar!**