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VTM

Guided Role-Play: Adapting to Customer responses, Part 1

DETAILS

- **ESTIMATED TIME**: 50-60 Minutes
- **DELIVERY MODE**: Guided Role-play
- **FACILITATOR:** General Manager or Designated Individual

VTM MATERIALS

- Trainier Activity Guide
- Role-Play Script: Prospecting (at end of this document)
- Role-play notes pages

TRAINER'S ACTIONS & CHECKLIST

- [ ] Use the trainer activity guide to:
    - deliver the role-play
    - Encourage team members to share their insights on their performance and their partners(s).
    - Wrap up the activity
- [ ] Address key items you observed and noted in the role-pay rubrics.
- [ ] Take note of what you feel, and what your team members feel, they should work to improve on for next week. Hold them to it!

FEEDBACK, VERIFYING, & ASSESSING

- **Trainer Review: P**rovide feedback after each role-play on tone, clarity, and engagement.
- **Group Reflection:** Encourage team members to share insights using prompts such as:
    - *Reflect on your progress: what stood out to you most about what went well and what needed improvement?*
    - *What key skill will you focus on strengthening moving forward?*

✶ Use this opportunity to hone in on prospecting skills!

✶ This activity requires the completion of two role-play rounds.

✶ **Encourage Adaptability:** Each scenario is different because each individual is different; team members should adjust tone, pacing, and engagement accordingly.

✶ **Focus on Clarity, Not Perfection:** The goal is to practice effective communication, not memorize a script.

✶ **Debrief After Each Role-Play:** Have each pair discuss what went well and what could be improved to reinforce learning, then disucss as a whole.

Getting Started & What To Do

General Notes

- Plan for about 10-15 minutes per role-play, but adjust as needed.
  - 3-5 minutes for the scenario
  - A few minutes for note-taking
  - The remainder to discuss
- Notes should be used to evaluate the team member's performance, not the customer.
  - The team member playing the customer evaluates their partner.
  - The team member playing the team member evaluates themselves.
- There will be two rounds
  - After Round 1, switch partners and swap roles for Round 2.

During the Activity

- Observe your team and note what's going well and what may need improvement.

After Each Role-Play

- Have team members provide feedback using their notes highlighting:
  - Areas needing improvement
  - Areas where expectations were met and exceeded
- Facilitate a group discussion to share observations and insights.

Step-by-Step Delivery

Step 1: Explain the Activity

Time: 5-8 minutes

Purpose: Set the stage for team members to know the activity, its materials, and your goals.

1. Outline what the team will be doing.
2. Distribute printouts, or have the team open the notes and script in the VTM on their iPad, using scratch paper as needed for additional notes.
3. Review the Customer Behavior Snapshot.
4. Instruct team members to follow the script as written.
5. Review the notes page structure:
   - Left column: Needs work
   - Center column: Minimum expectations + examples
   - Right column: Good job
6. Review the focus of each note block using the subtitle and center column.

Step 2: Warm-Up & Scenario Preparation

Time: 5-8 minutes

Purpose: Build familiarity with the script and the content.

- Use the Prospecting Script.
- Read the script together to build familiarity.
- Pair up the team and assign:
  - One customer
  - One team member

Step 3: Role-Play Scenarios & Adjustments

Time: 10–15 minutes per round

Purpose: Provide structured practice applying communication, engagement, and adaptability skills through guided role-play and feedback.

Round 1: Initial Role-Play

Begin the role-play activity using the provided door-knocking script.

Each pair should:

- Follow the script as written
- Stay within their assigned roles (customer and team member)
- Focus on tone, clarity, engagement, and responsiveness

The team member playing the customer should:

- Follow the Customer Behavior Snapshot
- React naturally within the scenario

The team member playing the Sales Inspector should:

- Focus on delivery, not memorization
- Apply active listening and engagement techniques

During Round 1

- Observe how team members communicate and respond throughout the interaction
- Ensure notes are being captured using the role-play notes pages
- Reinforce that notes should evaluate the team member's performance, not the customer

Post Round 1: Partner Feedback & Self-Assessment

After completing the role-play:

- The customer partner provides feedback using their notes
- The team member completes their self-assessment

Have each pair briefly discuss:

- What met or exceeded expectations
- What needs improvement
- One adjustment to apply in the next round

Allow 2–3 minutes for this discussion before continuing.

Round 2: Role Swap & Adjustment

Have team members:

- **Switch roles** (customer ➡ team member)
- Switch partners if applicable

Begin Round 2 of the role-play.

Encourage team members to:

- Apply at least one adjustment identified from Round 1
- Improve clarity, tone, and engagement
- Adapt more effectively to the customer's responses

During Round 2

- Continue observing interactions and note improvements
- Look for visible adjustments based on feedback from Round 1

Post Round 2: Final Pair Discussion

- After completing Round 2:
- Partners provide feedback and complete notes
- Each team member identifies:
  - One improvement they successfully made
  - One area they still need to work on

Trainer Role Throughout Step 3

- Circulate and observe multiple pairs
- Provide quick coaching where needed
- Identify strong examples and common gaps to bring into Step 4 discussion

Step 4: Final Reflection Discussion & Activity Wrap Up

Time: 8–10 minutes

Purpose: Reinforce key takeaways from both role-play rounds and connect performance to real-world application.

Begin by reviewing key observations from the activity:

- Common strengths demonstrated across role-plays
- Patterns in areas needing improvement
- Notable examples of strong communication, tone, or engagement

Team Member Reflection, ask:

Have each team member use their role-play notes pages or scratch paper to write their responses before sharing.

- What is one thing you improved from Round 1 to Round 2?

- What is one area you still need to work on?
- What feedback from your partner or trainer stood out the most?
- What adjustment will you apply in your next real customer interaction?

After writing, call on team members to share their responses and discuss as a group.

Reinforce:

- Strong sales conversations require **active listening and adaptability**
- Each customer interaction is different and requires **adjusting tone, pacing, and approach**
- Progress comes from **applying feedback and making small adjustments over time**

Trainer Action:

- Highlight 1–2 **strong examples f**rom the role-plays
- Call out 1–2 c**ommon improvement** areas for the team
- Reinforce expectations for applying these skills in the field before the next VTM

VTM Script: Prospecting the Neighborhood

A Sales Inspector knocks on the neighbor's door next to Mrs. Wells. John, the neighbor, opens the door.

Inspector: Hello, John. Do you have a minute?

John: Sure, what's up?

Inspector: My name is [Inspector's Name]. Just a few minutes ago, I was talking with your neighbor, Mrs. Wells, about her Landscape Service with Massey Services.The family has been a happy, satisfied customer for the last couple of years. I was wondering if The Wells have ever shared their satisfaction with their lawn and landscape service with you?

John: You mean Larry and Linda Wells?

Inspector: Yes.

John: Yes, we go on walks sometimes and Larry may have mentioned he liked his lawn service company.

Inspector: I'm glad to hear that. Do you have a current provider?

John: Yep, Quality First. Been with them for about 10 years.

Inspector: Have you ever compared services?

John: No, I haven't.

Inspector: Let me ask you, what do you like about Quality First?

John: Nice people at Quality First. They seem to do okay.

Inspector: If you could change anything about their service, what would it be?

John: The lawn looks good. However, I was not happy I had to replace 500 square feet of turf from chinch bug damage a few months ago.

Inspector: John, what if I were to tell you that if Massey Services was your provider at the time you had chinch bug damage, that $500 plus you spent on new sod would have been on Massey Services' dime, not yours?

John: So you're telling me you guarantee the lawn from damage like I had?

Inspector: Yes. With our Monthly Landscape Program, we replace any new insect damage in your lawn. Not only do we include insect damage replacement for your lawn, we include insect damage on trees and shrubs up to 10 feet with a 4-inch trunk or less.

John: Then I guess it would be a good idea to at least see what Massey Services can do for my lawn and shrubs. Go ahead and write something up for me.

Inspector: I will be glad to provide you with a detailed written analysis. I encourage you to walk the property with me so we can discuss the needs that I find and what solutions we offer.

John: Okay, let's go.

VTM Notes Page

WHO'S AT THE DOOR? A BASIC INTERACTION

Customer Behavior Snapshot: A basic, ideal interaction where the customer is failry neutral but open to conversation. Follow the script as it is written.

Observe and assess the team member's clarity, structure, and body language.

Notes Used:

- Engagement & Connection
- Nonverbal Communication
- Verbal Communication

Focus Areas:

- Speaking clearly and confidently with a natural, engaging tone.
- Using open body language and eye contact to reinforce engagement.
- Establishing rapport and keeping the conversation flowing.

Questions to Ask Yourself When Evaluating Communication Skills:

- How well does the team member set the tone for a positive interaction?
- Does the team member naturally engage the customer without sounding scripted?
- Is the team member using body language effectively?

Engagement & Connection

For establishing rapport, making interactions feel natural, and keeping the customer engaged.

I wonder...	Standards	I like...
Evidence of areas that may need growth and improvement.	Ideals performance or metrics for this activity.	Evidence of meeting or exceeding the standards.
	Establishes rapport and makes the interaction feel personal and engaging. Examples: • Uses a friendly and approachable demeanor that puts the customer at ease. • Finds a small personal connection to make the conversation feel natural. • Shows enthusiasm and genuine interest in the interaction.	

Notes Page

Verbal Communication

For delivering clear, confident, and professional speech in customer interactions.

I wonder...	Standards	I like...
Evidence of areas that may need growth and improvement.	Ideals performance or metrics for this activity.	Evidence of meeting or exceeding the standards.
	Speaks clearly and confidently at an appropriate pace. Examples: • Uses a steady, natural pace for clarity. • Adjusts tone based on customer engagement. • Provides explanations without overwhelming the customer.	

Nonverbal Communication

For using body language, eye contact, and gestures to reinforce engagement

I wonder...	Standards	I like...
Evidence of areas that may need growth and improvement.	Ideals performance or metrics for this activity.	Evidence of meeting or exceeding the standards.
	Maintains open body language, steady eye contact, and appropriate gestures. Examples: • Uses open posture and gestures to reinforce messages. • Maintains eye contact to build trust. • Avoids closed-off or distracting body language.	