1

VTM

Guided Role-Play: Delivering a Strong Introduction, Part 1

DETAILS

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

VTM MATERIALS

- Trainier Activity Guide
- Introduction Draft from previous VTM (optional)
- Role-play notes pages

TRAINER'S ACTIONS & CHECKLIST

- [ ] Use the trainer activity guide to:
  - Deliver the guided role-play
  - Facilitate partner feedback and self-reflection
  - Lead the group discussion and activity wrap-up
- [ ] Address key items you observed and noted in the role-pay notes.
- [ ] Identify 1–2 focus areas each team member should continue improving before the next VTM and reinforce accountability for applying them in the field.

FEEDBACK, VERIFYING, & ASSESSING

- **Trainer Review:** Provide feedback after each role-play on confidence, clarity, structure, and engagement.
- **Group Reflection:** Encourage team members to share insights using prompts such as:
  - *What stood out most about how your introduction landed with the customer?*
  - *What is one adjustment you will apply in your next customer interaction?*

- **This role-play is part of a multi-week progression.** Each round builds toward a complete sales conversation.
- **This role-play is not scripted!** Team members may reference the introduction they drafted in the previous VTM, but should deliver it conversationally and adapt based on the customer's response.
- **Focus on Clarity, Not Perfection:** The goal is to sound confident and natural, not scripted.
- **Encourage Adaptability:** Each customer responds differently—tone, pacing, and approach should adjust accordingly.
- **Debrief After Each Role-Play:** Have partners discuss what worked and what to improve, then reflect as a group.

Getting Started & What To Do

General Notes

- This VTM focuses **only on the sales introduction.**
- Team members may reference the i**ntroduction they drafted in the prior VTM**, but this role-play is not scripted.
- This is the first part of a multi-week role-play progression.
- The focus is delivery, confidence, and engagement—not word-for-word accuracy.
- Each team member should complete two role-play rounds.

Time Guidance

- Plan for 10–15 minutes per role-play round, adjusting as needed:
  - 3–5 minutes for the scenario
  - A few minutes for notes
  - Remaining time for feedback and discussion

Notes Usage

- Notes should evaluate the **team member's performance**, not the customer.
- The team member playing the customer evaluates their partner.
- The team member playing the Sales Inspector completes a self-assessment.

During the Activity

- Observe confidence, tone, pacing, and how naturally the introduction is delivered.
- Note patterns to address in the group discussion.

After Each Role-Play

- Have team members provide feedback using their notes highlighting:
  - What worked well
  - What needs improvement
  - One clear adjustment to apply next round
- Facilitate a group discussion to share observations and insights.

Step-by-Step Delivery

Step 1: Explain the Activity

Time: 5-8 minutes

Purpose: Set clear expectations for the focus of this VTM and how this role-play differs from previous weeks.

1. Explain that this role-play focuses **only on delivering a strong sales introduction.**
2. Reinforce that this role-play is not scripted like earlier activities.
   - Team members may reference any **introduction they drafted in previous VTMs,** but they should not read from or recite it.

- The emphasis is on natural delivery, confidence, and engagement.

3. Reinforce the progression:
   - This is **Part 1 of a larger conversation** that will be practiced over multiple VTMs.
   - Today's focus is **how the introduction lands**, not fact-finding or transitioning to the inspection.
4. Review the materials being used:
   - Drafted introduction from prior VTMs (if applicable)
   - Role-play notes pages
5. Review the notes page structure:
   - **Left column**: Needs work
   - **Center column:** Minimum expectations + examples
   - **Right column:** Good job
6. Review the focus areas for this VTM:
   - Confidence
   - Clarity
   - Tone and pacing
   - Initial engagement

Step 2: Warm-Up & Scenario Preparation

Time: 5-8 minutes

Purpose: Prepare team members to deliver their introductions naturally and confidently before role-playing.

- Give team members a moment to review their drafted introductions from previous VTMs.
- Reinforce key expectations:
  - The draft is a reference only, not a script.
  - Introductions should sound conversational and adaptable to the customer.
- Remind the team:
  - Strong introductions feel natural, not rehearsed.
  - Delivery matters more than exact wording.
- Pair up the team and assign roles:
  - One Customer
  - One Sales Inspector

Step 3: Role-Play Scenarios & Adjustments

Time: 10–15 minutes per round

Purpose: Provide structured practice delivering a strong, confident sales introduction and applying feedback through repetition.

Round 1: Initial Introduction

Instructions for Team Members

- The Sales Inspector delivers their sales introduction naturally.
- Team members may reference their drafted introduction mentally, but should not read from or recite it.
- Focus on:
  - Confidence and clarity
  - Tone and pacing
  - Establishing engagement early
  - Sounding natural rather than rehearsed

Customer Role

- Act as the customer.
- Respond naturally to the introduction.
- Follow the Customer Behavior Snapshot, if provided.

Trainer Role During Round 1

- Circulate and observe multiple pairs.
- Watch for:
  - How confidently the introduction is delivered
  - Whether tone and pacing feel natural
  - How the team member responds to the customer's initial cues
- 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

Time: 2–3 minutes

After completing Round 1:

- The team member playing the customer provides feedback using their notes.
- The Sales Inspector completes their self-assessment.
- Each pair briefly discusses:
  - What met or exceeded expectations
  - What needs improvement
  - One specific adjustment to apply in Round 2

Round 2: Role Swap & Adjustment

- Have team members:
  - Switch roles (Customer → Sales Inspector)
  - Switch partners, if applicable
- Begin Round 2 of the role-play.
- Encourage team members to:
  - Apply at least one adjustment identified in Round 1
  - Improve tone, pacing, or delivery based on feedback

- Focus on sounding more confident and conversational

Trainer Role During Round 2

- Continue circulating and observing.
- Look for visible improvements from Round 1.
- Note which adjustments had the greatest impact on engagement.

Post-Round 2: Final Pair Discussion

After completing Round 2:

- Partners provide feedback and finish their notes.
- Each team member identifies:
- One improvement they successfully made
- One area they still need to work on

Step 4: Final Reflection Discussion & Activity Wrap Up

Time: 8–10 minutes

Purpose: Reinforce key takeaways, connect performance to real-world application, and prepare the team for the next VTM in the series.

Begin by reviewing key observations from the activity:

- Common strengths demonstrated across role-plays
- Patterns in areas needing improvement
- Notable examples of strong, confident introductions
- Call out how:
  - Natural delivery improved engagement
  - Small adjustments in tone or pacing made introductions feel more authentic

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 feedback from your partner stood out the most?
- What adjustment will you apply in your next real customer introduction?

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

Trainer Close:

- 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

Notes Page

PART 1 - DELIVERING A STRONG SALES INTRODUCTION

Scenario Context

This role-play focuses on the opening moments of a sales conversation. The customer is neutral and open to conversation, with no strong objections or resistance. The goal is to evaluate how confidently and clearly the Sales Inspector delivers their introduction and establishes early engagement.

Customer Behavior Snapshot

The customer is polite, neutral, and willing to engage. Responses may be brief or conversational, allowing the Sales Inspector to establish rapport, set the tone, and make a strong first impression. The customer should react naturally to tone, pacing, and confidence cues.

Observe and assess how the team member delivers their sales introduction and connects with the customer during the opening of the conversation.

Notes Used:

- Engagement & Connection
- Verbal Communication

Focus Areas:

- Delivering a confident, clear introduction.
- Using a natural tone and effective pacing.
- Establishing early engagement and rapport.
- Sounding conversational rather than rehearsed.

Questions to Ask Yourself When Evaluating Communication Skills:

- Does the team member sound confident and natural rather than scripted?
- Is the introduction clear, structured, and easy to follow?
- Does tone, pacing, and body language encourage engagement early?
- Does the introduction feel like a strong first impression?

VTM Notes Page

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.	

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.	