1

VTM

Guided Role-Play: Delivering a Strong Introduction, Part 2

DETAILS

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

VTM MATERIALS

- Trainier Activity Guide
- Role-play notes pages
- Trainer Explainer

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 questions generated the most meaningful customer responses?*
  - *What is one adjustment you will apply to improve your questioning or follow-up 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

- Team members should begin with a brief, natural introduction, then transition into fact-finding.
- The primary focus is on questioning and listening, not the introduction itself.
- **This role-play is not scripted.**
- This is the **second** part of a multi-week role-play progression.
- The focus is **question quality, listening, and adaptability**, not rushing to solutions.
- Each team member should complete two role-play rounds.
- A **Trainer Explainer** on questioning techniques is available and may be used to reinforce concepts during the activity.
  - This can be referenced during the warm-up or introduced before the role-play if additional guidance is needed.
  - Use it to support team members in understanding open-ended questions, probing techniques, and effective follow-ups.

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 shifting from introduction to fact-finding and customer insight gathering.

1. Explain that this role-play focuses on **fact-finding and understanding customer needs.**
   - Team members should begin with a brief, natural introduction, then transition into asking questions. The focus of this activity is how effectively they move into fact-finding and gather customer insights.
   - Team members may reference any **introduction they drafted in previous VTMs,** but they should not read from or recite it.
   - The goal is to ask open-ended, effective questions, not just ask more questions.
   - The conversation should feel natural, not like an interrogation.
2. Reinforce the progression:
   - This is **Part 2 of a larger conversation** that will be practiced over multiple VTMs.
   - Today's focus is understanding the customer, not presenting solutions or transitioning.
3. Review the materials being used:
   - Drafted introduction from prior VTMs (if applicable)
   - Role-play notes pages
4. Review the notes page structure:
   - **Left column:** Needs work
   - **Center column:** Minimum expectations + examples
   - **Right column:** Good job
5. Review the focus areas for this VTM:
   - Open-ended questioning
   - Active listening
   - Follow-up and clarification
   - Identifying customer concerns and prioritiesClarity

<u>Step 2: Warm-Up & Scenario Preparation</u>

Time: 5-8 minutes

Purpose: Prepare team members to ask effective, adaptive questions during the role-play.

- Give team members a moment to review their drafted introductions from previous VTMs.
- Remind the team that the introduction should be quick and natural; its purpose is to smoothly lead into the conversation, not to be the focus of the role-play.
- Reinforce key expectations:
  - There is no script.
  - Questions should be based on what the customer actually says.
- Remind the team:
  - Strong fact-finding feels conversational and curious.
  - Listening is just as important as asking questions.
- Pair up the team and assign roles:

- One Customer
- One Sales Inspector
- If needed, review the Trainer Explainer on questioning to reinforce:
  - The difference between open-ended and closed questions
  - How to use follow-ups to gather more detail
  - How to keep the conversation natural and conversational

Step 3: Role-Play Scenarios & Adjustments

Time: 10–15 minutes per round

Purpose: Provide structured practice gathering customer insights and refining questioning techniques.

Round 1: Fact-Finding Conversation

Instructions for Team Members

- The Sales Inspector begins with a brief, natural introduction, then transitions into fact-finding.
- Team members may reference their drafted introduction mentally, but should not read from or recite it.
- Focus on:
  - Asking open-ended questions
  - Listening fully before responding
  - Using follow-up questions to clarify
  - Identifying customer concerns

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:
  - Use of open vs. closed questions
  - Quality of follow-up questions
  - Listening and response timing
- Ensure notes are being captured using the role-play notes pages.
- Reinforce that notes should evaluate the team member's performance, not the customer.

Trainer Tip: If team members struggle to move beyond basic or closed-ended questions, pause briefly and use the Trainer Explainer to reinforce key questioning techniques before continuing.

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:
  - One strong question used
  - One missed opportunity to go deeper
  - 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 follow-up questions and listening
  - Keep the conversation natural and engaging

Trainer Role During Round 2

- Continue circulating and observing.
- Look for improved questioning and listening behaviors.
- 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 effective questioning and prepare for transitioning conversations forward.

Begin by reviewing key observations from the activity:

- Common strengths demonstrated across role-plays
- Patterns in missed follow-ups
- Examples of strong customer insights uncovered
- Call out how:
  - Better questions led to more detailed responses

- Active listening improved conversation flow

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 question that helped you uncover useful information?
- What feedback from your partner stood out the most?
- What adjustment will you apply in your next customer interaction?

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

PART 2 – FACT-FINDING & GATHERING CUSTOMER INSIGHTS

Scenario Context

This role-play focuses on the middle of the sales conversation, after rapport has been established. The Sales Inspector's goal is to uncover customer concerns, priorities, and needs through effective questioning and active listening.

Customer Behavior Snapshot

The customer is open and willing to talk, but may provide limited or surface-level information unless prompted. The customer should respond naturally to the inspector's questions and offer more detail when questions are clear, open-ended, and engaging.

Observe and assess how effectively the team member gathers customer insights through questioning and listening.

Notes Used:

- Active Listening
- Strategic Questioning

Focus Areas:

- Asking open-ended questions that encourage dialogue.
- Using follow-up questions to clarify and dig deeper.
- Listening without interrupting or rushing to conclusions.
- Identifying customer concerns and priorities based on responses.

Questions to Ask Yourself When Evaluating Communication Skills:

- Does the team member primarily use open-ended questions rather than closed ones?
- Are follow-up questions used to clarify and expand on customer responses?
- Does the conversation feel natural and conversational rather than interrogative?
- Does the team member accurately identify the customer's key concerns or needs?

Notes Page

Active Listening

For demonstrating attentiveness, acknowledging concerns, and responding appropriately.

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.
	Listens attentively, acknowledges concerns, and asks follow-up questions. Examples: • Does not interrupt and allows the customer to fully express concerns. • Uses follow-up questions to clarify understanding. • Shows engagement through nodding and verbal affirmations.	

Strategic Questioning

For asking purposeful, open-ended questions that encourage customer dialogue and uncovers key concerns.

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.
	Uses well-structured open-ended questions that invite discussion and uncover customer concerns. Examples: • Begins with “What” or “How” instead of “Do you” or “Is there.” • Builds on customer responses with relevant follow-ups • Adjusts questioning based on customer engagement level.	

THE ART OF EFFECTIVE QUESTIONING

Asking the right questions is one of the most critical skills a Sales Inspector can develop. **A well-structured question can build trust, uncover hidden concerns, and guide customers toward a solution**. This explainer will help you guide team members in how to use **open-ended, probing, and impact questions effectively,** while avoiding common questioning mistakes—like making customers feel interrogated or forcing rushed answers.

This explainer is designed to help you with this task and follows three key principles:

1. **Open-ended questions uncover details and create engagement.**
2. **Probing questions dig deeper into specific concerns.**
3. **Impact questions highlight urgency and reinforce the value of Massey's services.**

Effective questioning starts with knowing when to use open-ended vs. closed questions.

Closed Questions

- **Definition**: Lead to short, specific answers (yes/no, a number, or a fact).
- **Purpose**: Use when verifying facts, confirming details, or narrowing down choices.
- **Examples**:
  - *Have you ever had a termite inspection before? (Yes/No)*
  - *When was the last time you had your lawn treated? (Date/Time)*
- **Watch Out:** Too many closed questions in a row can feel like a checklist or an interview, which may cause the customer to disengage.

Open-Ended Questions

Definition: Invite discussion and detailed responses.

Purpose: Use to gather information, understand concerns, and build trust.

Examples:

- *What concerns do you have about your home's pest protection? (Encourages details.)*
- *Tell me more about what you've noticed in your lawn recently. (Opens dialogue.)*
- **Watch Out**: Open-ended questions can lead to long or off-topic responses if not guided well. Be ready to steer the conversation back with a focused follow-up or summary.

Best Practices

✓ Start with **What, How, or Tell me about**... instead of "Do you" or "Is there."

✓ Use **open-ended questions first** to gather information, then **closed questions to confirm details.**

✓ Avoid **rapid-fire closed questions**—this can feel like an interrogation.

2.2.1 Trainer Explainer

Probing Questions: Digging Deeper

Once a customer provides an initial response, probing questions help gather more details and clarify their true concerns.

- **Definition**: Encourage the customer to expand on their initial response.
- **Purpose**: Use when clarifying vague statements or identifying root concerns.
- **Examples**:
  - *You mentioned seeing pests in your kitchen. Can you tell me when you started noticing them? (Clarifies timeline)*
  - *What do you mean when you say your lawn isn't as healthy as it used to be? (Encourages detail.)*

📌 Customers don't always express their real concerns at first. A probing question lets them elaborate naturally instead of feeling pressured.

Impact Questions: Creating Urgency & Value

Impact questions help customers understand why taking action now is important.

- **Definition**: Highlight the consequences of inaction or the benefits of a solution.
- **Purpose**: Use when motivating the customer to see the importance of Massey's services.
- **Examples**:
  - *If left untreated, termites can cause serious structural damage. How would that impact your home's value? (Creates urgency.)*
  - *How important is long-term pest prevention for your family's health and comfort? (Reinforces value.)*

📌 Avoid fear-based selling! Instead of scaring the customer into a sale, use impact questions to help them see the real-life benefits of acting now.

What NOT to Do: The 'Why Question' Problem

✖ **Avoid starting too many questions with 'Why.'**

- **Why Questions** can feel confrontational or put customers on the defensive, like they have to justify themselves.
- Instead, rephrase as '**What' or 'How' questions** to make the conversation more open.

Example Fixes: Poor → Better

- *Why haven't you scheduled pest control before?* → *What concerns have kept you from scheduling pest control in the past?*
- *Why do you want a lawn service now?* → *How do you see a lawn service helping your property long-term?*

Overview

Great questioning is about curiosity, not interrogation.

- ✓ Use **open-ended** questions to gather insight.
- ✓ Use **probing** questions to dig deeper.
- ✓ Use **impact** questions to create urgency.
- ✓ Avoid too many **'Why' questions**—opt for '**What' and 'How'** instead.