1

VTM

Guided Role-Play: Steps 3 & 4: Presenting Solutions, 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
- Optional:
  - Sample inspection findings
  - Inspection graph
  - Fast Fact Sheets
  - Proposal Folder materials

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
- [ ] What helped the customer feel understood during the conversation?
- [ ] Identify specific skills team members should continue improving in future customer interactions.

FEEDBACK, VERIFYING, & ASSESSING

- **Trainer Review:** Provide feedback after each role-play on confidence, value-based communication, and objection handling.
- **Group Reflection:** Encourage team members to share insights using prompts such as:
  - *What helped communicate value beyond the price of the service?*
  - *What is one adjustment you will apply in your next customer conversation?*

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

✶ Encourage Adaptability: Customers may react emotionally when discussing inspection findings. Team members should adjust their approach accordingly.

✶ Focus on Clarity, Not Perfection: The goal is to maintain trust and guide the conversation toward solutions.

✶ Debrief After Each Role-Play: Have partners discuss what worked well and what could be improved before sharing as a group.

Getting Started & What To Do

General Notes
- This role-play is not scripted.
- This VTM focuses on presenting solutions to a customer who reacts emotionally to the findings.
- The Sales Inspector should assume the problem has already been defined. Their goal is to present the solution, explain the benefits, and respond appropriately to the customer's reaction.
- The focus is on maintaining professionalism while helping the customer move toward a solution.
- 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 how well team members:
  - De-escalate emotional reactions
  - Maintain professionalism
  - Reassure the customer
  - Redirect the conversation toward solutions
- Note patterns to address during the final 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 presenting solutions to customers who react emotionally to findings.

1. Explain that this role-play focuses on customers who may feel embarrassed, frustrated, defensive, or personally judged by the findings.
2. Reinforce:
   - The problem has already been defined.
   - The role-play begins when the Sales Inspector presents the recommendation.
   - This role-play is not scripted.
3. Discuss why customers become defensive:
   - They may believe the findings reflect poorly on them.
   - They may feel blamed for the issue.
   - They may become uncomfortable discussing the problem.
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:
   - Emotional control and professionalism
   - De-escalation
   - Reassurance
   - Solution-focused communication

Step 2: Warm-Up & Scenario Preparation

Time: 5-8 minutes

Purpose: Prepare team members to handle emotional reactions while maintaining customer trust.

- Discuss the difference between:
  - A customer objection
  - A customer emotional reaction
- Reinforce:
  - Emotional customers want understanding before solutions.
  - Acknowledging feelings is not the same as agreeing with them.
  - Focusing on solutions helps move the conversation forward.
- 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: Practice maintaining professionalism and presenting solutions while managing emotional customer reactions.

Round 1: Presenting the Recommendation

Instructions for Team Members

- The Sales Inspector should:
  - Present the recommendation using Findings → Solution → Benefit
  - Acknowledge the customer's concerns
  - Redirect the conversation toward resolving the issue
- Focus on:
  - Professionalism
  - Empathy
  - Clarity
  - Problem-solving

Customer Role

- Act as a defensive customer.
- Respond emotionally to the findings.
- Express concern that the issue reflects negatively on you or your home.
- Question whether the situation is really your fault.

Trainer Role During Round 1

- Circulate and observe multiple pairs.
- Watch for:
  - Professional responses to emotional reactions
  - Appropriate acknowledgment of customer concerns
  - Ability to redirect toward solutions
  - Confidence without becoming argumentative
- 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 customer partner 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
- Choose a different form reason tone for the defensive customer.

- Begin Round 2 of the role-play.

Encourage team members to:

- Apply at least one adjustment identified in Round 1
- Strengthen credibility through evidence
- Present solutions with greater confidence

Trainer Role During Round 2

- Continue circulating and observing.
- Look for visible improvements from Round 1.
- Note examples of effective skepticism handling.

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 professionalism and solution-focused communication.

Begin by reviewing key observations from the activity:

- Common strengths demonstrated across role-plays
- Patterns in areas needing improvement
- Notable examples of professionalism, empathy, and customer reassurance

Call out how:

- Acknowledging customer concerns helped reduce defensiveness
- Small adjustments in tone and wording made recommendations feel more supportive and helpful

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** from the role-plays
- Call out 1–2 **common improvement** areas for the team
- Reinforce expectations for applying these skills in the field before the next VTM

VTM Notes Page

PRESENTING SOLUTIONS: THE DEFENSIVE CUSTOMER

Customer Behavior Snapshot: The customer feels personally attacked by the findings and becomes defensive during the conversation. They may believe the issue reflects negatively on them or their home. The Sales Inspector must maintain professionalism, acknowledge concerns, and redirect the discussion toward solutions.

Observe and assess how the team member manages emotional reactions, reassures the customer, and maintains a solution-focused conversation.

Notes Used:

- Emotional Control & Professionalism
- De-Escalation & Managing Difficult Customers

Focus Areas:

- Acknowledging customer concerns without becoming defensive.
- Maintaining professionalism and composure.
- Redirecting the conversation toward problem-solving.
- Positioning the recommendation as helpful and proactive.
- Reinforcing the benefits of addressing the issue.

Questions to Ask Yourself When Evaluating Communication Skills:

- Does the team member acknowledge the customer's feelings appropriately?
- Do they remain calm and professional throughout the interaction?
- Is the conversation redirected toward solutions effectively?
- Is the recommendation framed as helpful rather than accusatory?
- Does the customer feel reassured rather than judged?

Notes Page

Emotional Control & Professionalism

For maintaining composure & professionalism under pressure.

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.
	Remains calm, professional, and composed in challenging interactions. Examples: • Controls tone and body language to avoid escalating the situation. • Maintains professionalism even when the customer is rude or dismissive. • Responds with patience and confidence, not frustration or defensiveness.	

De-Escalation & Managing Difficult Customers

For handling aggressive, frustrated, or rude customers effectively.

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 de-escalation techniques to redirect a tense or difficult interaction. Examples: • Acknowledges frustration without mirroring negative energy. • Slows speech, lowers tone, and maintains a neutral stance to defuse tension. • Shifts the conversation toward solutions while setting clear boundaries.	