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VTM Guided Role-Play: Getting a "Yes: & Closing the Sale

DETAILS

- **ESTIMATED TIME**: 45-60 Minutes
- **DELIVERY MODE**: Guided Role-play
- **FACILITATOR:** General Manager or Designated Individual

VTM MATERIALS

- Trainier Activity Guide
- Role-Play Notes Pages
- Optional:
  - Sales Manual – Chapter 7
  - Optional supporting inspection or proposal materials for evidence-based discussion

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
- ☐ Reinforce communicating long-term value rather than simply defending price.
- ☐ Identify skills team members should continue strengthening in price-sensitive conversations.

FEEDBACK, VERIFYING, & ASSESSING

- **Trainer Review:** Provide feedback after each role-play on engagement, evidence-based communication, value framing, and closing confidence..
- **Group Reflection:** Encourage team members to share insights using prompts such as:
  - *What helped shift the conversation from price to value?*
  - *What adjustment would you apply in your next price-sensitive conversation*

Key Reminders



- ✶ This activity requires the completion of two role-play rounds.
- ✶ Understand the Concern: Price hesitation may mean more than "too expensive."
- ✶ Value Over Price: Show what the customer receives for the investment.
- ✶ Use Evidence Purposefully: Relevant inspection findings and documentation strengthen credibility.
- ✶ 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.
- Each team member should complete two role-play rounds.
- This VTM focuses on a customer who likes the Termite Protection Plan but is concerned about affordability.
- Team members should assume the service has already been presented and the conversation has moved into the closing phase.
- The focus is on maintaining engagement, supporting value with evidence, reframing price, and confidently moving toward commitment.

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:
  - Maintain customer engagement while discussing price.
  - Identify what specifically concerns the customer about affordability.
  - Support recommendations with relevant evidence.
  - Reframe cost around long-term value.
  - Transition naturally toward scheduling service.
- 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 expectations for addressing affordability while maintaining engagement and reinforcing value.

1. Explain that the customer likes the recommendation but is uncertain whether they can afford the service.
2. Reinforce:
   - The service has already been presented.
   - The conversation is now in the closing phase.
   - This role-play is not scripted.
3. Discuss Why Customers Focus on Price:
   - The customer may understand the service but not yet connect the cost to long-term protection.
   - An immediate expense can feel more significant than a future risk.
   - The customer may have a genuine affordability concern that needs to be understood before responding.
   - Customers may need evidence that supports why the recommended protection is worth the investment.
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:
   - Reframing cost as long-term value.
   - Understanding the customer's specific price concern.
   - Supporting recommendations with relevant evidence.
   - Maintaining engagement while discussing affordability.
   - Closing confidently without creating pressure.

Step 2: Warm-Up & Scenario Preparation

Time: 5-8 minutes

Purpose: Prepare team members to respond to price concerns with value, evidence, and confidence.

- Review:
  - Cost versus long-term value.
  - Relevant inspection findings and documentation.
  - Closing techniques that fit price-sensitive conversations.
- Reinforce:
  - Don't immediately defend the price. Understand the concern first.
  - Use evidence because it supports the recommendation, not simply to overwhelm the customer with information.
  - Keep the conversation focused on customer priorities and protection.

- Confidence in the recommendation helps preserve perceived value.

- Pair up and assign roles.
  - One Customer
  - One Sales Inspector

Step 3: Role-Play Scenarios & Adjustments

Time: 10–15 minutes per round

Purpose: Practice reframing affordability concerns, reinforcing long-term value, and confidently closing the Termite Protection Plan.

Round 1: The Indecisive Customer

Instructions for Team Members

- The Sales Inspector should:
  - Understand what specifically concerns the customer about the price.
  - Reframe cost as long-term protection and value.
  - Use relevant evidence to support the recommendation.
  - Maintain engagement while addressing affordability.
  - Apply an appropriate closing approach when the customer is ready.
- Focus on:
  - Engagement & connection
  - Supporting claims with evidence
  - Value-based communication
  - Confident closing

Customer Role

- You like the proposed program.
- You believe the recommendation makes sense.
- Your primary concern is affordability.
- Do not reject the service outright.
- Respond naturally based on how well the Sales Inspector addresses your concern.

Trainer Role During Round 1

- Circulate and observe multiple pairs.
- Watch for:
  - Whether the team member understands the price concern before responding.
  - Effective framing of long-term value.
  - Relevant use of inspection findings or supporting materials.
  - Continued customer engagement.
  - A smooth, confident transition toward scheduling service.
- 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
- Begin Round 2 of the role-play.

Encourage team members to:

- Apply at least one adjustment identified in Round 1.
- Better understand the customer's specific affordability concern.
- Strengthen the connection between evidence and value.
- Maintain engagement rather than becoming defensive about price.
- Close with greater confidence.

Trainer Role During Round 2

- Continue circulating and observing.
- Look for visible improvements from Round 1.
- Note examples of effective questioning and reframing.
- Look for smoother, more natural closing attempts.

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 value-based closing, evidence-backed recommendations, and confident handling of price concerns.

Begin by reviewing key observations from the activity:

- Strong examples of shifting the conversation from price to value.
- Effective use of inspection findings and supporting evidence.
- Strong customer engagement during price discussions.
- Common improvement opportunities.

Call out how:

- Understanding the affordability concern before responding created a more customer-focused conversation.
- Supporting the recommendation with relevant evidence strengthened credibility.
- Connecting price to long-term protection helped frame the service as an investment rather than an immediate expense.
- Confident, natural transitions made the close feel less pressured.

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 helped you shift the conversation from price to value?*
- *What adjustment will you apply in your next price-sensitive conversation?*

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 closing skills in the field.

VTM Notes Page: Round 2

THE PRICE-CONSCIOUS CUSTOMER

Customer Behavior Snapshot: The customer likes the recommendation and sees value in the proposed service, but is concerned about affordability. The Sales Inspector must understand the customer's price concern, reinforce the long-term value of protection, and confidently guide the conversation toward commitment without creating pressure.

Observe and assess how the team member addresses price concerns, reinforces value, and confidently moves the customer toward a decision.

Notes Used:

- Engagement & Connection
- Supporting Claims with Evidence
- Value-Based Communication

Focus Areas:

- Reframing cost as a long-term investment rather than an immediate expense.
- Using strategic questioning to understand what specifically concerns the customer about the price.
- Applying a structured closing approach that reinforces value while maintaining engagement.
- Encouraging commitment by reinforcing urgency without making the customer feel pressured.

Questions to Ask Yourself When Evaluating Communication Skills:

- Does the team member uncover what specifically concerns the customer about the price?
- Is long-term value communicated clearly and confidently?
- Does the team member use relevant evidence to support the recommendation?
- Does the conversation remain engaging and customer-focused?
- Is the transition toward scheduling service smooth, natural, and confident?

Engagement & Connection

FFor 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.	

VTM Notes Page

Supporting Claims with Evidence

For reinforcing credibility through the effective use of documentation, inspection findings, and tangible proof.

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 the inspection graph, Fast Fact Sheets, and proposal materials to justify findings. Examples: • Points to specific areas in the inspection graph to reinforce findings. • Uses Fast Fact Sheets to validate explanations. • Clearly explains how findings connect to customer concerns.	

Value-Based Communication

For positioning service costs as long-term investments rather than immediate expenses.

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.
	Frames the service as a proactive investment rather than just an expense. Examples: • Uses real-world comparisons (e.g., "This is like routine car maintenance—preventative action saves money long-term.") • Highlights cost savings through prevention rather than repair. • Adjusts framing of price based on customer priorities.	