1 VTM Closing with Confidence

DETAILS

- **ESTIMATED TIME**: 45-60 Minutes
- **DELIVERY MODE**: Trainer-Guided Discussion + Scenario-Based Conversations
- **FACILITATOR:** General Manager or Designated Individual

VTM MATERIALS

- Trainier Activity Guide
- Referral Practice Worksheet
- Sales Manual, Chapter 7, as needed

TRAINER'S ACTIONS & CHECKLIST

- ☐ Use the trainer activity guide to:
  - ○ Lead a discussion on asking for referrals and the Pass-It-On Program.
  - ○ Review best practices for timing and framing referral requests.
  - ○ Facilitate scenario-based customer conversations.
  - ○ Guide team members in adapting their approach to different customer responses.
- ☐ Ensure all team members actively participate in the discussion and scenario practice.
- ☐ Reinforce natural, confident referral requests that maintain customer trust.
- ☐ Highlight strong approaches and common improvement opportunities.

FEEDBACK, VERIFYING, & ASSESSING

- **Trainer Review:** Evaluate how well team members recognize referral opportunities, frame requests naturally, and adjust to customer responses.
- **Group Reflection:** Encourage team members to share insights using prompts such as:
  - *What made a referral request feel natural rather than transactional?*
  - *How could you adjust your approach when the customer hesitates?*

Key Reminders



- ✶ Timing Matters: Ask when the customer has expressed satisfaction.
- ✶ Make It About Helping Others: Referrals should feel like an opportunity to share a positive experience, not a request for leads.
- ✶ Confidence Matters: A hesitant ask makes the customer more hesitant.
- ✶ Leave the Door Open: Not every customer will have a referral today, but the conversation can create future opportunities.

Getting Started & What To Do

General Notes

- This activity focuses on helping team members ask for referrals naturally and confidently.
- This is a t**rainer-guided discussion and scenario-based activity**, not a role-play.
- Team members should consider how timing, wording, and customer response affect the referral conversation.
- The trainer presents the customer situations and facilitates discussion around the best approach.
- Complete all three scenarios if time allows, with emphasis on comparing how the approach changes based on customer response.

Time Guidance

- Referral Discussion: 8–10 minutes
- Scenario-Based Conversations: 15–20 minutes
- Group Review & Application: 5–8 minutes
- Wrap-Up: 5–8 minutes

During the Activity

Observe how well team members:

- Recognize appropriate referral opportunities.
- Frame referral requests positively.
- Adjust based on customer hesitation or resistance.
- Keep conversations comfortable and customer-focused.
- Understand when to pursue a referral and when to leave the door open.

After Each Exercise

Discuss:

- What approach felt most natural?
- What could make the request stronger?
- How did the customer's response change the next step?
- What would you do differently in a real customer conversation?

Step-by-Step Delivery

Step 1: Trainer Guided Discussion — Asking for Referrals

Time: 8-10 minutes

Purpose: Establish when and how referral requests should become a natural part of the customer conversation.

Open Discussion

Ask: "Why are referrals important, and what makes a referral request feel natural instead of pushy?"

Review Best Practices

Timing Matters

- Look for customer satisfaction before asking.
- Positive comments or enthusiasm create natural opportunities.

Make It About the Customer

- Position referrals around helping friends, family, or neighbors who may benefit from the same service.

Use the Pass-It-On Program

- Reinforce how the program benefits the customer and their referral.

Secure Permission

- When a customer provides a referral, confirm permission to use their name when making contact.

Keep the Relationship Going

- Discuss how follow-up after the sale, including a thank-you card, can help maintain the relationship and create future referral opportunities.

Step 2: Scenario-Based Conversations – Asking for Referrals

Time: 15-20 minutes

Purpose: Practice identifying the best referral approach based on different customer responses.

For each scenario:

Present the customer situation.

- Give team members a moment to think or write.
- Ask:
  - *What opportunity do you see here?*
  - *How would you approach the referral request?*
  - *What would you say?*
- Have team members explain their reasoning.
- Compare approaches as a group.
- Reinforce what keeps the request natural and customer-focused.

Step 3: Compare & Refine

Time: 5-8 minutes

Purpose: Reinforce how the referral approach changes with the customer rather than relying on one memorized request.

Compare the three customer responses:

- Satisfied and ready: Take advantage of the natural opportunity.
- Satisfied but hesitant: Understand and reassure.
- Satisfied but no referral today: Keep the door open.

Ask the group:

- *What stayed consistent across all three approaches?*

- *What needed to change?*
- *Which approach felt most natural?*
- *What wording sounded transactional or uncomfortable?*
- *What would you actually feel comfortable saying in the field?*

Reinforce that there is not one perfect referral script. The goal is to recognize the opportunity, make the request confidently, and respond appropriately to what the customer gives you. This aligns with the source activity's emphasis on natural, adaptable requests rather than a rigid referral pitch.

Step 4: Final Reflection Discussion & Activity Wrap Up

Time:8-10 Minutes

Purpose: Reinforce natural referral conversations and prepare team members to apply the skill with real customers.

Begin by Reviewing Key Observations

- Strong examples of natural referral requests.
- Effective ways of responding to hesitation.
- Approaches that kept the door open for future referrals.
- Common wording that made the interaction feel too transactional.

Team Member Reflection – Ask

Have team members briefly write their responses before sharing:

- *What part of asking for referrals feels most comfortable to you?*
- *Which customer response would be hardest for you to handle?*
- *What wording or approach from today's discussion would you actually use?*
- *What will you do differently the next time you have an opportunity to ask for a referral?*

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

Trainer Close

- Highlight 1-2 strong approaches from the activity.
- Call out 1-2 common improvement areas.

Reinforce that asking at the right moment, keeping the request customer-focused, and asking with confidence make the ask feel natural, and that a referral conversation can still be successful even when the customer does not provide a name today.

Trainer Activity Guide: Scenarios

Scenario 1: The Satisfied Customer

Situation: The customer is happy with the service and gives positive feedback.

Team Member Challenge

Determine how to:

- Acknowledge the customer's positive experience.
- Use that satisfaction as a natural transition into the referral request.
- Introduce the Pass-It-On Program.
- Secure a referral and permission to use the customer's name.

Discuss

- What signals tell you this is the right time to ask?
- How can you make the transition feel conversational?
- How would you confirm permission for the follow-up?

Scenario 2: The Hesitant Customer

Situation: The customer is satisfied but seems unsure about referring others.

Team Member Challenge

Determine how to:

- Acknowledge the hesitation.
- Avoid pressuring the customer.
- Reframe the request around helping someone else who may benefit.
- Keep the customer comfortable with the conversation.

Discuss

- What might be causing the hesitation?
- What wording would reassure rather than pressure?
- When should you stop pushing for a referral and leave the door open?

Scenario 3: The “I Don’t Know Anyone” Customer

Situation: The customer is satisfied but says they cannot think of anyone who needs service.

Team Member Challenge

Determine how to:

- Avoid treating the response as a rejection.
- Reframe the request around future referral opportunities.
- Give the customer an easy way to share the Sales Inspector's information later.
- End the conversation positively and professionally.

Discuss

- How can you keep the referral opportunity open without continuing to push?
- What would a soft referral prompt sound like?
- How can you make it easy for the customer to remember or recommend you later?

VTM Referral Practice Worksheet

Instructions: Review each customer situation with your team. For each scenario, identify the referral opportunity, describe how you would approach the conversation, and write what you might say. Be prepared to explain why your approach fits the customer's response.

Scenario 1: The Satisfied Customer

What signals tell you this is a good time to ask for a referral?

How would you transition into the referral request?

What would you say?

Scenario 2: The Hesitant Customer

What might be causing the customer's hesitation?

How would you adjust your approach?

What would you say?

Scenario 3: The "I Don't Know Anyone" Customer

How can you keep the referral opportunity open without creating pressure?

How would you make it easy for the customer to refer someone later?

What would you say?

Think About This

A successful referral conversation does not always end with a name and phone number. The goal is to recognize the opportunity, ask naturally and confidently, respond appropriately, and leave the customer comfortable recommending Massey when the opportunity arises.