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VTM Guided Role-Play: Growing Leads, Not Weeds

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

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 observed in the role-play notes and rubrics.
- ☐ Reinforce natural follow-up conversations, customer satisfaction, and confident referral requests.

FEEDBACK, VERIFYING, & ASSESSING

- **Trainer Review:** Provide feedback after each role-play on customer engagement, referral transitions, confidence, and adaptability.
- **Group Reflection:** Encourage team members to share insights using prompts such as:
  - o *What made the referral request feel natural?*
  - o *How did the customer's response change your approach?*

Key Reminders



- ✶ Complete Two Rounds: Round 1 is required. Select the Round 2 customer that offers the most valuable additional practice.
- ✶ Follow-Up First: Confirm satisfaction and keep the conversation customer-focused before moving into the referral request.
- ✶ Make Referrals Feel Natural: The request should feel like an extension of a positive conversation, not a transaction.
- ✶ Adapt to the Customer: Listen and respond to the customer's level of comfort, engagement, and concerns.
- ✶ 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

- Each team member should complete two role-play rounds.
- The activity begins at the end of a successful sale.
- Round 1 uses The Enthusiastic Customer.
- For Round 2, choose either:
  - The "I Don't Know Anyone" Customer, or
  - The Customer With Concerns based on team performance and areas for improvement.
- Team members should practice:
  - Confirming customer satisfaction.
  - Transitioning naturally into a referral request.
  - Responding appropriately to the customer's reaction.
- The focus is on maintaining trust and engagement throughout the entire follow-up conversation.

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:
  - Verify customer satisfaction.
  - Maintain rapport and engagement.
  - Recognize referral opportunities.
  - Transition naturally into the referral request.
  - Adapt appropriately when the customer hesitates or expresses a concern.
- 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.

3 VTM Trainer Activity Guide

Step-by-Step Delivery

Step 1: Explain the Activity

Time: 5-8 minutes

Purpose: Set expectations for conducting a natural follow-up conversation that confirms customer satisfaction and leads into a referral request.

1. Explain that this role-play begins at the end of a successful sales conversation.
2. Reinforce:
   - The customer has agreed to service.
   - The Sales Inspector should verify satisfaction before asking for a referral.
   - The referral request should feel like a natural extension of the conversation.
   - This role-play is not scripted.
3. Discuss Why Referral Conversations Can Feel Uncomfortable
   - Customers may be satisfied but uncomfortable sharing another person's information.
   - Customers may simply not have someone in mind at that moment.
   - Moving too quickly into the referral request can make the interaction feel transactional.
   - A customer's tone, body language, and wording can signal whether to continue, adjust, or step back.
   - Maintaining trust is more important than forcing a referral.
4. Review the Notes Page Structure
   - **Left column:** Needs work
   - **Center column:** Minimum expectations + examples
   - **Right column:** Good job Guided Role-Play VTM Template
5. Review the Focus Areas for This VTM
   - Verifying customer satisfaction.
   - Maintaining engagement and connection.
   - Transitioning naturally into referral requests.
   - Responding appropriately to customer cues.
   - Protecting trust throughout the conversation.

Step 2: Warm-Up & Scenario Preparation

Time: 5-8 minutes

Purpose: Prepare team members to connect customer satisfaction naturally to a referral conversation.

- Review:
  - Why referrals are most effective after the customer expresses satisfaction.
  - How open-ended questions can help confirm how the customer feels about the sale.
  - How the Pass-It-On opportunity can be positioned naturally as part of a positive customer conversation.
- Reinforce:

- Don't rush directly into asking for names.
- Listen to the customer before deciding how to continue.
- Referral requests should feel conversational rather than memorized.
- A successful interaction does not always have to end with a referral.

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

Step 3: Role-Play Scenarios & Adjustments

Time: 10–15 minutes per round

Purpose: Practice verifying satisfaction, asking for referrals naturally, and adapting to different customer responses.

Round 1: The Enthusiastic Customer

Customer Initial Response: "This looks great! I'm looking forward to not having to deal with the rats in my shed!"

After the referral request:

Customer Referral Response "Oh, I actually know a few people who might be interested!"

Instructions for Team Members

The Sales Inspector should:

- Acknowledge and reinforce the customer's positive experience.
- Recognize the referral opportunity.
- Transition naturally into asking for a referral.
- Respond positively when the customer identifies potential referrals.
- Keep the interaction conversational rather than transactional.

Focus on:

- Engagement
- Rapport
- Confident verbal communication
- Natural referral transitions

Customer Role

- Be clearly satisfied with the service decision.
- Express enthusiasm about resolving the problem.
- Respond positively when asked for referrals.
- Offer that you know several people who may be interested.

Trainer Role During Round 1

Circulate and observe multiple pairs.

Watch for:

- Recognition of the referral opportunity.
- A natural transition from satisfaction into the referral request.
- Clear and confident verbal communication.
- Customer-focused language.
- Whether the request feels helpful rather than transactional.
- Ensure notes are being captured using the role-play notes pages.

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 & Trainer-Selected Customer

Before beginning Round 2, select the customer scenario that gives the team the most useful additional practice:

Option A: The "I Don't Know Anyone" Customer

Use this option when team members need more practice with:

- Reading customer engagement cues.
- Strategic questioning.
- Maintaining conversation when the referral request stalls.
- Avoiding passive or rushed responses.

Option B: The Customer With Concerns

Use this option when team members need more practice with:

- Active listening.
- Respecting privacy concerns.
- Reframing hesitation.
- Maintaining trust when the customer is uncomfortable sharing information.

Have team members:

- Switch roles.
- Switch partners, if applicable.

Option A: The "I Don't Know Anyone" Customer

Customer Initial Response: "I'm glad we got this fumigation set up, it seems like a good service, and I need to evict these unwanted 'guests' from this place."

After the referral request:

Customer Referral Response: "I don't really know anyone off the top of my head who would be interested."

The customer should appear uncomfortable and closed off.

Instructions for Team Members

The Sales Inspector should:

- Recognize the shift in customer engagement.
- Avoid immediately abandoning or repeating the request.
- Use strategic questions to keep the conversation comfortable and open.
- Respond to verbal and nonverbal customer cues.
- Leave the referral opportunity open without creating pressure.

Focus on:

- Nonverbal communication
- Strategic questioning
- Verbal communication
- Customer comfort

Customer Role

- Begin satisfied with the service.
- Become less comfortable when the referral request is made.
- Say you cannot think of anyone.
- Use more closed body language and shorter responses.

Trainer Role During Round 2

Watch for:

- Recognition of verbal and nonverbal cues.
- Appropriate follow-up questions.
- Whether the Sales Inspector avoids a passive or rushed response.
- A comfortable and professional end to the referral conversation.

Option B: The Customer With Concerns

Customer Initial Response: "I appreciate your help with my trees and shrubs. Everything seems good so far and I'll be ready for the technician to come out."

After the referral request:

Customer Referral Response: "I don't usually give out names. My friends and I made a promise to each other that we wouldn't share without asking first. I really have to think about it."

Instructions for Team Members

The Sales Inspector should:

- Listen fully to the customer's concern.
- Acknowledge and respect the customer's privacy boundary.
- Avoid pressuring the customer for names.
- Reframe the referral opportunity in a low-pressure way.
- Keep the relationship positive even if no referral is provided.

Focus on:

- Active listening
- Reframing concerns
- Customer trust
- Professionalism

Customer Role

- Be satisfied with the service.
- Express a genuine privacy concern when asked for referrals.
- Make it clear that you are not comfortable sharing someone's information without permission.
- Remain open to the conversation if your concern is respected.

Trainer Role During Round 2

Watch for:

- Attentive listening.
- Acknowledgment of the customer's privacy concern.
- Appropriate reframing without pressure.
- Whether the Sales Inspector protects the positive relationship.
- A professional and comfortable end to the interaction.

Post-Round 2: Final Pair Discussion

After completing Round 2:

- Partners provide feedback and finish their notes.
- Each team member identifies:
  - One adjustment they successfully applied from Round 1.
  - One area they still need to work on.
  - One thing the different customer reaction required them to change.

Step 4: Final Reflection Discussion & Activity Wrap Up

Time: 8–10 minutes

Purpose: Reinforce natural referral conversations, adaptability, and maintaining customer trust.

Begin by reviewing key observations from the activity:

- Strong examples of recognizing referral opportunities.
- Natural transitions from customer satisfaction to referral requests.

- Effective responses when customers hesitated or expressed concerns.
- Common improvement opportunities.

Call out how:

- Confirming satisfaction first made referral requests feel more natural.
- Listening to the customer's response helped determine whether to continue, reframe, or step back.
- Small adjustments in wording, pacing, and body language helped protect customer comfort.
- A successful referral conversation does not always have to end with a name or phone number.

Team Member Reflection, ask:

Have each team member use their role-play notes pages or scratch paper to write their responses before sharing.

- *What part of the referral conversation felt most natural?*
- *What did you change between Round 1 and Round 2?*
- *How did the customer's response affect your approach?*
- *What feedback from your partner stood out the most?*
- *What adjustment will you apply in your next referral 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 that referral requests should feel like a natural continuation of a positive customer relationship, not an additional sales transaction.

VTM Notes Page: Round 1

THE ENTHUSIASTIC CUSTOMER

Customer Behavior Snapshot: The customer is enthusiastic about their service decision and openly expresses satisfaction. They are receptive to the referral request and quickly identify people who may also benefit from Massey's services. The Sales Inspector should recognize the opportunity and transition naturally into the referral conversation.

Observe and assess how the team member reinforces customer satisfaction and transitions naturally into a confident referral request.

Notes Used:

- Engagement & Connection
- Veerbal Communication

Focus Areas:

- Reinforcing the customer's positive experience.
- Recognizing the right moment to ask for a referral.
- Using engaging, confident language.
- Making the referral request feel natural rather than transactional.
- Encouraging customer advocacy while maintaining rapport.

Questions to Ask Yourself When Evaluating Communication Skills:

- Does the team member recognize the referral opportunity?
- Is the transition into the referral request natural?
- Is the request clear and confident?
- Does the conversation remain engaging and customer-focused?
- Does the referral request feel like a natural extension of the customer's positive experience?

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.	

VTM Notes Page: Round 1

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.	

VTM Notes Page: Round 2 (option a)

THE "I DON'T KNOW ANYONE" CUSTOMER

Customer Behavior Snapshot: The customer is satisfied with their service decision but becomes uncomfortable and closed off when asked for a referral. They say they cannot think of anyone who may be interested. The Sales Inspector must recognize the shift in engagement and respond without making the customer feel pressured.

Observe and assess how the team member reinforces customer satisfaction and transitions naturally into a confident referral request.

Notes Used:

- Nonverbal Communication
- Strategic Questioning
- Verbal Communication

Focus Areas:

- Recognizing changes in body language, tone, and engagement.
- Using strategic questions to keep the conversation comfortable.
- Avoiding a passive, rushed, or repetitive referral request.
- Maintaining clear and confident communication.
- Leaving the door open for a future referral.

Questions to Ask Yourself When Evaluating Communication Skills:

- Does the team member recognize the customer's change in engagement?
- Are follow-up questions appropriate and natural?
- Does the team member avoid creating pressure?
- Is verbal and nonverbal communication open and professional?
- Does the conversation end positively even without an immediate referral?

Nonverbal Communication

For using body language, eye contact, and gestures to reinforce engagement.

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.
	Maintains open body language, steady eye contact, and appropriate gestures. Examples: • Uses open posture and gestures to reinforce messages. • Maintains eye contact to build trust. • Avoids closed-off or distracting body language.	

VTM Notes Page: Round 2 (option a)

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.	

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.	

VTM Notes Page: Round 2 (option b)

THE CUSTOMER WITH CONCERNS

Customer Behavior Snapshot: The customer is satisfied with the service but is uncomfortable sharing someone else's information without permission. The Sales Inspector must acknowledge the concern, respect the customer's boundary, and keep the referral opportunity open without damaging trust.

Observe and assess how the team member listens to the customer's concern, responds respectfully, and reframes the referral request without creating pressure.

Notes Used:

- Active Listening
- Skepticism & Reframing Concerns

Focus Areas:

- Listening fully before responding.
- Acknowledging and respecting the customer's privacy concern.
- Reframing the referral opportunity in a low-pressure way.
- Avoiding defensiveness or repeated pressure.
- Maintaining trust and a positive customer relationship.

Questions to Ask Yourself When Evaluating Communication Skills:

- Does the team member listen fully and acknowledge the concern?
- Is the customer's privacy boundary respected?
- Is the referral request reframed without pressure?
- Does the team member maintain a positive, professional tone?
- Does the conversation preserve trust even if no referral is provided?

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.	

VTM Notes Page: Round 2 (option b)

Skepticism & Reframing Concerns

For overcoming hesitation & skepticism 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.
	Recognizes customer skepticism and confidently reframes concerns into opportunities. Examples: • Acknowledges customer doubts without becoming defensive. • Uses clear, positive language to reframe hesitation into curiosity. • Provides reassurance through facts, testimonials, or service benefits.	