

Facilitator Guide

Group # 3

Business to Business Interviewer Training: Assertiveness

Audience for this Module:	<p>Entry- and mid-level interviewers who will be doing Business to Business (“B2B”) interviewing.</p> <p>This module is a prerequisite to the Group III module “Managing Objections and Refusals.”</p>
Goal of this Module:	<p>To train B2B interviewers to</p> <ul style="list-style-type: none"> • Identify and define assertiveness • Understand the importance of assertiveness in B2B interviewing • Implement assertiveness into the interviewing process
Logistics: Materials, Room type/setup, Time needed, etc.)	<p style="text-align: center;">You will need:</p> <ul style="list-style-type: none"> • The CD that contains the PowerPoint presentation • Computers/monitors with speakers and/or Laptop and/or LCD projector to display PowerPoint presentation • Blackboard, flip chart or dry-erase board and appropriate writing implements <ul style="list-style-type: none"> ▪ For role-playing after training, create several scenarios between customers and interviewers that are specific to the type of work your company does. ▪ You may also want to monitor some live calls in which case appropriate telecom should be available. ▪ If you do practice calls, you may want to tape-record them. <p style="text-align: center;">Room Set-up:</p> <ul style="list-style-type: none"> ▪ The PowerPoint portion of this training does not require special room set-up. <p style="text-align: center;">Time Needed:</p> <p>You will need about 1 hour & 10 Minutes for power point section of training.</p>
How to make the most of this Module	<p>The presentation is customizable to meet with your company’s standard procedures and protocols, as long as it does not substantively change the content or nature of the training modules. You should view the full presentation to decide if you wish to customize any slides.</p>
How to assess learning	<p>Along with questions and answers during the PowerPoint training, the POST-PowerPoint activity will allow you to assess learning while reinforcing B2B skills.</p>



Marketing Research Association

Group III: Assertiveness

Facilitator Guide

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Overview:

The "B2B Assertiveness" module provides B2B interviewers with training that centers around their 'approach' to the respondent and gatekeepers. As is indicated by its title, the focus of this module is not on what questions to ask or what standard responses to use; it focuses on how these are delivered. An important point for interviewers to understand is that what we say and how we say it are partners in ensuring their success, not only in getting accurate information, but also in ensuring the respondent's cooperation.

This module will take approximately two hours to present with all additional activities.

Objectives:

Be the end of this module, B2B interviewers will successfully:

- Identify and define assertiveness
 - Explain the importance of assertiveness
 - Implement assertiveness into the interviewing process
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Materials:

- The CD that contains the PowerPoint presentation
 - Computers/monitors with speakers and/or Laptop and/or LCD projector to display PowerPoint presentation
 - Blackboard, flip chart or dry-erase board and appropriate writing implements
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Activities & Suggestions:

- Role-play: Create scripts of introductions, objections/questions and standard responses. Have pairs of participants role-play the scenarios in front of the group, portraying each approach. The group can critique their performance.
 - Monitoring live calls: Make copies of page 4 of the participant workbook. Using a speakerphone, listen to live calls and have the participants evaluate the interviewer's performance by indicating if the call represented an assertive, passive or aggressive approach. If you are unable to listen to live calls, substitute tape recordings of live calls for this activity.
 - Later in the training, tape record practice calls to respondents and play them for the class. As a group, discuss if the recording represents an assertive approach. If not, discuss ways to improve.
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Points of Focus:

Slide 3: This slide defines assertiveness.
Discuss with the group the three approaches that can be taken when dealing with a gatekeeper or respondent.

1. The assertive approach
2. The passive approach
3. The aggressive approach

Slide 4: Ask the group to discuss why these are important.

- ready to answer the respondent's questions and objections
- listens so they can respond correctly; the answer or standard response matches the question or objection
- confident and upbeat

Slide 5: Have the participants refer to their workbook for Slide #5.

Activate the sound file by double clicking the mouse. As each sound file plays, have the interviewers record why each of these in an example of assertiveness. Discuss as a group. Record their answers on the board.

Slide 6: Slide 6 explains why the recordings the interviewers just heard are examples of assertiveness.

Each example had:

- Appropriate tone
- Speed/pace was neither too fast nor too slow
- Demeanor was positive and upbeat
- Delivery was conversational

Each interviewer was prepared. When the respondent answered the phone or expressed objections, the interviewer immediately answered without hesitation. At the same time, the interviewer listened to the objection and made sure that the standard response or clearing was appropriate to the concern or objection.

Slide 7: Have interviewers turn their workbook to the page for Slide #7.
Double click each sound file to activate. The participants should

record in their workbooks why these are not examples of assertiveness. The title of each starburst explains why the example is not assertive: timid, argumentative, tired, etc.

- Slide 8:** Discuss with the group the level of control utilized by each approach.
- No control – too apprehensive to make the attempt.
 - Out of control – think that the respondents can be intimidated into cooperating.
 - In control – know what to say and how to say it.
- Slide 9:** Discuss as a group other words that can define assertiveness. Write these on the board.
- Slide 11:** Ask the class what they would do. What standard response would they use and how would they say it. See if anyone has a different standard response to use. Ask for volunteers to 'act out' their standard response. Have the rest of the class critique them – was the standard response correct and was it assertively delivered?
- Slide 12:** For the timid response, discuss what is said as well as how it is said (hesitantly, softly, long pauses, etc.). Ask each participant for the correct standard response. You could note the different options on the dry erase board to emphasize the point that it is how it is said as well as what is said. This point is emphasized by the fact that the group may suggest more than one standard response for the situation.
- Slide 13:** Discuss with the class what an aggressive or hostile response would be. Be sure to touch on both what is said and how it is said (rudely, quickly too deeply or highly pitched tone, etc.). Ask each participant for the correct standard response. You could note the different options on the dry erase board to emphasize the point that it is how it is said as well as what is said. This point is emphasized by the fact that the group may suggest more than one standard response for the situation.
- Slide 14:** Discuss with the class what an assertive response would be. Be sure to touch on both what is said as well as how it is said (confidently, correct pace, conversationally, etc.). Go around the room asking for the correct standard response. You could note the different options on the dry erase board to emphasize the point that it is how it is said as well as what is said. This point is emphasized by the fact that the group may suggest more than one standard response for the situation.

- Slides 16-31:** Discuss the 12 suggested ways to be assertive.
- Slide 17:** An assumptive approach is one in which you 'expect' participation and cooperation. If you are apprehensive or feel that the respondent will not cooperate, you will communicate this in your voice.
- Slide 18:** This relates to the assumptive approach. If you feel the respondent will cooperate, your voice will communicate this with a cheerful and enthusiastic delivery. If you are cheerful, positive and upbeat, the respondent is more likely to respond in kind. Wouldn't you rather spend your time with a cheerful person instead of one with a negative attitude? The respondent feels the same way.
- Slide 19:** Ask the group to define the word monotone:
- ✚ A succession of sounds or words uttered in a single tone of voice.
- Ask volunteers to deliver the introduction of the survey in a monotone voice. Ask the group members to think about their favorite movie. Would it still be their favorite movie if the actors did not vary their vocal delivery at all during the entire movie? Would you be able to stay awake to watch it from beginning to end?
- Slides 20-21:** It is important to note here is that the interviewer should listen to the respondent and match her pace to the respondent's pace.
- Slide 22:** Talking over the respondent is an aggressive approach. However, the interviewer should exert a level of control if the respondent is veering extensively from the topic. Additionally, the interviewer should be prepared to respond correctly when the respondent has finished.
- Slide 23:** Refusals and objections will occur. It is important that the interviewer address each and every call. The number of refusals combated per call will sometimes depend on what they are. When objecting, the respondent may give clues to other concerns that need to be addressed.
- Slide 24:** It is important to ensure that the standard response matches the objection. The only way to do this is to listen. Your credibility comes into question if you respond with "we are not selling anything" when the respondent has said he is busy and to call back another time. Additionally, listen to the respondent's tone of voice or the verbal clues given to you. If the respondent is calling out to someone that he will be right there after he answers this call, don't

pressure him now. Introduce yourself and the reason for the call. Acknowledge the situation and offer to call back at a less busy time. Ask when would be the best time to call back.

Slides 25-27: These slides go hand in hand with listening to respondents. If respondents sounds like they are having a bad day acknowledge that as you speak with them: "It sounds like you're having a rough day," or "I realize you are in a jam at the moment, but perhaps I could take just a few moments of your time to explain the importance of my call." If a respondent communicates information that you can note for the next time you call, do so. For example:

- they or their boss are not feeling well
- other staff members are out and they have a heavy work load
- last-minute project that needs to be complete

Stress the last point on slide 26 and the first point on slide 27 -- objections-- are an opportunity to persuade and educate the gatekeeper or the respondent.

The point regarding "Try to counter at least 2 objections..." is dependent on the situation. The interviewer should react appropriately. If the after two objections the situation turns into a callback request, ask for the callback. If the refusal is a hard refusal such as, "You've called here seven times and every time I tell you we can't participate; if you call again our legal department is going to begin a suit against your company for harassment," then end the call without numerous rebuttals.

Slide 28: Here is where confidence and preparedness come into play. If you have standard responses ready that are appropriate to the objections given, and these responses both persuade and educate the respondent, then you will be 'in charge' of the call. Add to this the confident and smooth delivery of these responses and your chances of success are increased.

Slide 29: Remind the group of the first point of "Ways to be assertive – the positive assumptive approach." Acknowledge objections and refusals every time they occur, but forget them once you have finished the call. Stress that the respondent's problem is with the call, not with the caller. You are in a type of 'don't kill the messenger' situation where the bearer of bad news is blamed for the bad news. If necessary, take a break, get a drink of water, stand up and stretch; but don't take the refusal personally, and don't let the negativity you received carry over to the next call.

Slide 30: Believe it or not, you are playing a role with each and every call. Take a deep breath, clear your throat and be ready to go on stage when the curtain goes up (the respondent answers the phone). We may feel under the weather or have had a rough start to the day, but when the phone is answered we put those worries in the background and play the role of positive, assertive, upbeat research assistant.

Slide 31: This slide relates back to the positive assumptive approach – if you feel you will be successful in gaining cooperation, then you will. Use this approach on every call.

Slide 33: The point of this slide is that interviewers need to find their own comfortable level of assertiveness. A natural comfort level will be reflected in your voice, allowing for a more comfortable, natural delivery.

Slide 34: Have the interviewers turn to the page for Slide #34 in the workbook. Ten clips are played on this slide. The participants should refer to their booklet to indicate if each clip represents the assertive, passive, or aggressive approach. When you have completed all ten, replay them again and, as a group, discuss which approach was expressed and the reasons for each choice.

Each clip plays by placing the pointer on the speaker icon and clicking the left mouse button.

Answers:

1. *Assertive*
2. *Assertive*
3. *Passive*
4. *Assertive*
5. *Passive*
6. *Aggressive*
7. *Aggressive*
8. *Assertive*
9. *Passive*
10. *Aggressive*

**** Please note that an exam is also provided with the Facilitator Guide to assess learning from the course. ****