Facilitator Guide

Group # 3

Business to Business Interviewer Training: Managing Objections and Refusals

Audience for this Module:	Experienced telephone interviewers who will be doing Business to Business (“B2B”) interviewing. This module requires that the module “B2B Interviewing Training: Assertiveness” be completed as a prerequisite.
Goal of this Module:	To train B2B interviewers to: • identify the types of objections and refusals used by the Gatekeeper and Respondent • choose and deliver appropriate standard response to counter objections and answer questions • understand the importance of their delivery style
Logistics: Materials, Room type/setup, Time needed, etc.)	**You will need:** • The CD that contains the PowerPoint presentation • Computers/monitors and/or Laptop and/or LCD projector to display PowerPoint presentation • flip chart and markers • masking tape or other fixative to post flip chart pages • copy of “Standard Response Guide” for each interviewer ▪ For the ***PRE***-PowerPoint activity, you will need about 30 each of two different colored 3 x 5 cards and a broad-tipped felt marker for writing on cards ▪ For the ***POST***-PowerPoint activity, you will need a speakerphone to listen to live B2B interviews ▪ If you choose to add role-playing after training, create several scenarios between respondents and interviewers that are specific to the type of work your company does **Room Set-up:** ▪ The PowerPoint portion of this training does not require special room set-up.

	Time Needed: For the ***PRE***-PowerPoint activity, you will need about 40 minutes. The PowerPoint training should take about 1 hour and 40 minutes. ***POST***-PowerPoint call monitoring time is flexible and as suits your schedule.
How to make the most of this Module	Be sure to do the ***PRE-***PowerPoint activity as it will focus the interviewers on thinking like the executives they will be interviewing and the gatekeepers whose job it is to “protect” the executives. 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
How to assess learning	Along with questions/answers and activities during the PowerPoint training, it is suggested that you do role-playing after your have completed the PowerPoint. You may want to prepare a script of situations with which to cue the interviewers. An alternative is to prepare situations and write them onto 3x5 cards from which pairs of interviewers can take a card and do the role-playing exercise.

Group III:

Managing Objections and Refusals:

Facilitator Guide

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Overview:

The "Managing Objections & Refusals" presentation provides training for the B2B trainee on recognizing the types of questions, objections, and refusals the Gatekeeper and Respondent might have regarding participation in the B2B survey. Additionally, this presentation provides many options the interviewer can use in responding to the Gatekeeper and Respondent.

Objectives:

By the end of this module the B2B trainee will be able to successfully:

- Identify the types of objections and refusals used by the Gatekeeper and Respondent
- Identify when a question, objection or refusal has been used
- Choose and deliver appropriate standard responses to counter objections and answer questions
- Understand the importance of their delivery style

Materials:

- The cd that contains the PowerPoint presentation
- Computers/monitors and/or Laptop and/or LCD projector to display PowerPoint presentation
- flip chart and markers
- masking tape or other fixative to post flip chart pages
- copy of “Standard Response Guide” for each interviewer

- For the ***PRE***-PowerPoint activity, you will need about 30 each of two different colored 3 x 5 cards and a broad-tipped felt marker for writing on cards
- For the ***POST-***PowerPoint activity, you will need a speakerphone to listen to live B2B interviews

If you choose to add role-playing after training, create several scenarios between respondents and interviewers that are specific to the type of work your company does.

Timing:

- This module is estimated at 2 to 2.5 hours. Each slide/section has been timed separately. You may delete slides/sections to best fit your training needs and timeline.

Activities & Suggestions:

PRE-PowerPoint Activity:
There are two parts to this activity: "If You Were the Executive " and "If You Were the Gatekeeper".

If You Were the Executive

Description: This is an in-class discussion activity that will help trainees identify different types of executives and the challenges that come with interviewing them. This is a good activity to introduce the "Managing Objections & Refusals" module.

Materials Needed: Flip chart or white board
Markers appropriate to medium used

Approximate Time: 20 minutes

Divide your flip chart with a vertical line into two sections. At the top of the left section write the word "EXECUTIVES." At the top of the right section write the word "CHALLENGES."

Ask the class, "***When you think of the word 'executive,' what names come to mind?"*** Record these under the "EXECUTIVE" section of the flip chart.

If necessary, offer some suggestions of your own to the class to get the brainstorming started.

- Donald Trump
- Oprah Winfrey
- Ted Turner
- Steven Spielberg
- The CEO of your company

Now ask the class to ***"Think about the image you have of these types of executives. Think about the obstacles you might encounter if you were to ask one of these executives to participate in a typical survey that might last fifteen minutes or more."*** If necessary, offer some ideas of your own to get the discussion startEd.

- Out of the office most of the time
- In important meetings
- Too important to participate
- Secretary screens calls/difficult to get through to the executive

Record these under the "CHALLENGES" section for reference later in today's lessons.

Explain to the class that this module will address many of the challenges involved with B2B interviewing.

Pull the flip-chart page and post it on a wall for easy access and viewing throughout the module. You can do one of two things with the flip-chart page:

1) Refer to the page throughout the module as the challenges are presented and identify the appropriate responses.
2) Keep the page posted until the end of the module and use the challenges listed as discussion points; that is, having participants identify the appropriate responses.

If You Were the Gatekeeper

Description: This is an in-class discussion activity that will help trainees identify the challenges that come with getting past the gatekeeper. This is a good activity to introduce the "Managing Objections & Refusals" module.

Materials Needed: Flip chart or white board
Markers appropriate to medium used

Approximate Time: 20 minutes

Divide your flip chart with a vertical line into two sections. At the top of the left section write the word "GATEKEEPERS." At the top of the right section write the word "CHALLENGES."

Ask the class, "***When you think of the word 'gatekeeper,' what names come to mind?"*** Record these under the "GATEKEEPER" section of the flip chart.

If necessary, offer some suggestions of your own to the class to get the brainstorming started.

- Secretary
- Administrative Assistant
- Assistant to the President (Finance Director, etc.)
- Office Manager
- Office Administrator
- Etc.

Now ask the class to ***"Think about the image you have of these types of people. Think about the obstacles you might encounter if you were to ask one of these people to allow you to speak to his/her supervisor or boss.*** If necessary, offer some ideas of your own to get the discussion started.

- My boss is out of the office most of the time
- My boss is in meetings all day

- My boss is too important to participate

Record these under the "CHALLENGES" section for reference later in today's lessons.

Explain to the class that this module will address many of the challenges involved with B2B interviewing.

Pull the flip-chart page and post it on a wall for easy access and viewing throughout the module. You can do one of two things with the flip-chart page:

3) Refer to the page throughout the module as the challenges are presented and identify the appropriate responses.
4) Keep the page posted until the end of the module and use the challenges listed as discussion points; that is, having participants identify the appropriate responses.

***POST*-PowerPoint Activity:**

Shadowing

Utilize a speakerphone to patch into experienced interviewers' calls, allowing trainees to hear the interaction between interviewer and respondent. Pay special attention to the questions/objections and the responses used for each. Record the questions and objections heard, along with the rebuttal, on a white board. Refer to these during the module. Identify if the same rebuttal was used as suggested in the module. If not, discuss why.

Pair trainees with veteran interviewers on the production floor. Ask trainees to write down 3 or 4 of the objections that were identified during the "If Your Were the Executive" activity. While listening to the veteran interviewer, have them record the rebuttal that the veteran used when they encountered the situation.

Points of Focus:

Slide 4: Write the terms "Gatekeeper", "Respondent", "Objection/Refusal" and "Standard Response" on the board. Before proceeding through slides 5-8, discuss as a class the definition of each. Since there is no slide that specifically defines a standard response, be sure that the class has a firm understanding of the definition. "a standard response is a planned answer to counter objections or to respond to questions."

Slide 5: Discussion point – What would be considered important calls? Would survey calls be considered important? If not, why not? Discuss how an important part of this module is aiding the interviewer in conveying the importance of the call.

Slide 6: Refer to the list of executives created in the "If You Were the Executive" activity. This is the type of person whose opinions we are seeking.

Slide 7: Discuss possible definitions for objections and refusals.

Slide 9: Discussion Point – What types of objections would the Gatekeeper express?

Slide 10: Discussion Point – What types of objections would the Respondent express?

Slide 11: Discuss, as a group, the answer to the question, "What do you think a _______is?" by inserting the appropriate term.
Soft Refusals – give you the option of trying again.
Hard Refusals – make it clear not to call again.

Slide 14: Ask the group to determine if it is a soft or hard refusal. After they have determined a response, click the mouse for the refusal to appear in the correct column.

Slide 18: These are soft refusals veiled in the form of questions. Slides 21-24 will address each one of these separately.

Slides 21-24: Discuss how the interviewer needs to make the introduction before the gatekeeper asks a question. Discuss why the introduction would intentionally be kept short. Why wouldn't we introduce ourselves, the company we represent and the purpose of the call? The strategy is to have the gatekeeper transfer our call without asking its purpose. Hopefully, the respondent will assume the gatekeeper has validated the call. Additionally, some companies have an operator who simply transfers calls and does no screening. It would not be necessary to explain the call to this person. We may be transferred to the intended respondent's gatekeeper anyway, and this is where we will describe the purpose of the call.

Before moving to the next slide, discuss some possible questions the gatekeeper might ask. Record these on the white board.

Slide 21: Applicable laws and your company policy will dictate whether interviewers are to use their first name only, first and last name, or an alias of some kind.

Slide 24:

- For the second bullet, ask: – "Why do you think it is important that we be brief and to the point?"
- Too much information may decrease the importance expressed by being brief and to the point.
- Delivered assertively, a brief and to-the-point response conveys authority and confidence.

Lengthy explanations suggest you are rambling and losing confidence.

Slides 25-34: Discuss standard responses and ask for possible alternatives.

Activity Suggestion

- Write each objection listed on slide 28 on a separate note card (3 x 5 or 4 x 6 will work fine) of one color; pink or red is a good choice.
- Write each standard response from slides 28 through 34 on a separate note card of a different color; green is a good choice. You may record some standard responses more than once since one standard response may cover more than one objection.
- Keep each set of cards separate, but shuffle each set so that the order of the objections and the standard responses are not the same.
- Distribute one objection card and one standard response card to each trainee. Continue this way until all cards are drawn, even if each trainee has multiple objection and standard response cards.
- As each slide is revealed, have the trainee holding the matching objection card stand and read the objection aloud.
- Ask the trainee with the matching standard response to stand and read the response aloud.

Slide 35: Before proceeding to the next slide, ask: "We have talked about ways to answer the gatekeepers and respond to their objections and refusals. What other ways can we gain the gatekeeper's cooperation?" Discuss the answer as a group.

Stress the importance of getting the gatekeeper's name. Remind them to listen for the name, as the gatekeeper may provide it when answering the phone. Stress the importance of using the gatekeeper's name when / each time we call.

Use the voicemail system – rather than pressing zero for the receptionist, use the company's dial-by-name directory to reach the executive. Remind the trainee to ask for the executive's name during the initial call.

Ask: "Is it smooth sailing from here?" Ask the trainees to support their answers.

Slide 36 & 37: Ask: "What questions might the respondent have?" Record the questions on the white board. Discuss the similarities these questions have with the gatekeeper's questions.

Slide 38: Ask: What would be the responses to each question? Are these very different from our responses to the gatekeeper?

Slide 39: This slide provides the suggested responses to each question. The question comes up first and the response follows by clicking the mouse.

Slide 40-47 Provides additional questions the respondent may have. You could simply review the slide, as they provide the suggested responses along with some additional information. A discussion suggestion would be to go through each question as a group and decide on a suggested response or divide the class into groups and have each group identify and present a suggested response for each question. As you proceed through the slides, you can keep score of which group was correct and reward the group with the most correct answers.

The group should be identifying many of the responses that were used earlier in this module when reviewing gatekeeper questions and responses.

You may wish to get some background information regarding the sample vendors/providers your company uses to supplement this slide. Stress the need to follow-up with the responses contained to answer additional questions the respondent may have.

Slides 48-59 Interviewers may encounter objections and refusals from respondents as well. You may wish to repeat the colored card activity used at slides 28-34. Compare and contrast the objections and responses used here to those used with the gatekeeper.

Slide 60: Emphasize the point that how you say it is as important as what you say.

Slides 61-69: Additional points to emphasize:

- Be ready when the phone is answered. Don't let distractions keep you from responding to the first hello.
- Have your standard response help sheet ready and know where the gatekeeper rebuttals are. If possible, have the standard responses memorized, and practice delivery between calls.

Stress the importance of knowing the subject matter and being able to smoothly and correctly pronounce any unfamiliar terminology. Stumbling over words directly impacts the perception of confidence and detracts from sounding natural and conversational.
The surveys can be long and repetitious; smooth and conversational delivery can help in "masking" the amount of time being spent on the phone.
Your goal is to have the respondent enjoy the conversation with you.

Slide 63: Points 1, 2, 3 and 4 of the "Rapport & Assertiveness Checklist" all lead up to point 5. These are what help to give the interviewer the assumptive approach. It is the approach that assumes cooperation from the gatekeeper and respondent. Think of it as the leadership role in the conversation. You assume they will lead, you take the actions that show that assumption, and they will follow.

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

Business To Business Standard Response Guide

(Take-away document)

Standard responses are pre-determined responses designed to elicit an answer from a respondent. Perhaps more importantly, the correct standard response will help to put gatekeepers and respondents at ease and gain their cooperation.

Both the respondent and gatekeeper have their own set of responses that they use to dissuade marketing research companies such as ours. Your task as an interviewer is to convince them that their input is wanted and worthwhile. By having various responses at hand, you will be able to answer questions and counter refusals promptly while sounding confident and assertive in your delivery.

Standard responses must reassure respondents, put them at ease, and result in obtaining information. A respondent may tell an interviewer that he/she is too busy to do an interview, but an interviewer can use his/her standard responses to respond to this excuse quickly, appropriately and assertively.

Although you will experience situations that cannot be resolved, more often than not your attempts will be successful. Effective use of standard responses will ensure the maximization of each attempt.

As an interviewer you will encounter reluctance, unavailability and refusals from gatekeepers and respondents. You must be able to address such circumstances promptly and assertively.

Practice the delivery of standard responses to achieve a balance of alleviating concerns while also knowing when to 'give in' and end the conversation. Your effectiveness will be in direct proportion to your comfort and confidence levels in answering objections with thoughtful, assertive, professional standard responses.

Note that while standard responses do not have to be read “word for word” they should be appropriate to the situation. Standard responses may be combined fully or in part to answer any objections.

The following are suggested standard responses for many of the situations you will encounter:

B2B General Standard Responses

Gatekeeper:		Standard Response:
Who is ____ company?		____ is a marketing research company currently conduction research for the ____ industry.
What is this regarding?		We are conducting opinion research on ____. I assure you this is not a sales call. ____ products purchased by your organization, but I assure you this is not a sales call.
What are you selling?		We are only interested in your opinions and at no time will we attempt to sell you anything. The companies you receive services from rely on the information we collect. This is only an opinion survey; it is not a sales call. I would like to assure you this is not a sales call and there will be no sales follow-up. This call is for research purposes only, and all answers will be held in strict confidence.
It is against company policy to do surveys over the telephone.		Let me assure you we are not interested in any specific information about your company. All information provided is held in strict confidence. Let me assure you that we are not interested in specific information about your company; we are just looking for general information about your company's views on various ____ issues many companies are dealing with. Let me assure you that we are not interested in specific information about your company.

Gatekeeper (continued)**:**		**Standard Response:**
We cannot disclose any company information.		Let me assure you we are not interested in any specific information about your company.
That is all done at our corporate office.		I understand. May I speak with the person at your location who is the direct contact with the main office or contacts them to request service or inform them of problems? Who would be responsible for initiating contact with our corporate/head office if you were to require ____ products at your location? May I please speak to the person at your location who liaises with the corporate office or contacts them to request services or informs them of problems?
They are not interested. They are too busy.		I appreciate that he/she is very busy. However, if you would allow me the opportunity to explain the nature of this study I am sure he/she would like to participate. I appreciate that he/she is a very busy person. Perhaps it would be more convenient if I try later this week. Thank you for your help.
You have already called here about this study.		I realize you may have been contacted by our company previously, but we are a large research organization and it is quite possible you have been contacted for one of our other studies.
Our office/company is too small.		You sound ideal, as we are speaking to organizations of all sizes for this study. Your unique opinions are extremely important to our research.

Respondent:		Standard Response:
You already called me. I have already participated.		In order to accurately track trends and shifts in professionals' attitudes and opinions, we do want to speak to people who have taken part previously and would really appreciate your cooperation. **IF NO:** Would there be anyone else who shares a similar job function that I might speak with, as we would also like to gather thoughts and opinions from more than one representative at your company?
I don't have time for this.		I only need a few minutes of your time and I will be as brief as possible. If something comes up, you can put me on hold or I can arrange to call you back at a better time.
I'm really not interested in participating.		I understand. I would like to assure you that our research is completely legitimate and confidential. This is your opportunity to voice your opinions and help improve products and services. At no time will I attempt to sell you anything.
I don't know anything about that.		Your unique opinions are very important to our client. This is your opportunity to voice your opinions and help improve products and services in the marketplace. We seek the opinions of all people, and there are no right or wrong answers. We are interested in your opinions based on your personal experiences.
It is against company policy to do surveys over the telephone.		I understand you may have a policy against marketing research and receive many calls of this nature. Perhaps there's a better time that I may call you. When would be the best time to call back?

Respondent (continued)**:**		**Standard Response:**
We cannot disclose company information.		I'd like to assure you we are not interested in any specific information about your organization, only your personal opinions and views based on your experience with different products and services. All information will be held in strict confidence.
Why should I participate? What's in it for me?		Today, marketing research is one of the most important ways in which companies can influence the development of products and services to better meet your needs. Companies want your feedback to improve their products and services to meet your needs.
We don't what to buy anything. What are you selling?		We are only interested in your opinions and at no time will attempt to sell you anything.
What are the questions pertaining to?		Why don't I read you the first couple of questions to give you a good idea?
That still does not answer my question.		Our client is conducting an awareness study related to various types of ____ product, and we seek the unique opinions of professionals like you. We are conducting a study related to the experience companies have. When evaluating ____ providers, we seek the opinions of professionals such as yourself.

Callbacks:		**Standard Response:**
How long will this take?		The length can vary. We can start now and, if necessary, complete the study at a later time that is convenient to you.

Callbacks (continued)**:**		**Standard Response:**
I am very busy.		I appreciate that you are busy and that your time is important. If something comes up during the interview you can put me on hold or I can arrange to call you back to complete at a later time.
This isn't a good time.		I understand. When would he a better time to reach you? For whom should I ask?
If you mail it to me I will be happy to do it.		Unfortunately, the nature of this study does not allow me to mail it to you. It is an awareness study that requires your candid instant responses. Unfortunately, the nature of this study does not allow me to send it to you, as it is a study that requires spontaneous responses.
General Situations:		**Standard Responses**
What do you do with this information?		The responses to this study will be used to inform major ____ companies of new trends in the market. Your answers are completely confidential and are compiled as statistics along with those of other professionals who participate.
Who do you represent? Who is your client?		We are completely independent; however, we conduct work on behalf of leading ____ firms.
If you can't tell me who this is for, why should I take part?		In the same way that I can guarantee your confidentiality with to the information that you give, I am bound to keep the names of our clients confidential so as to avoid biasing your responses in any way.
How did you get our phone number?		Your number was randomly selected from a list of similar organizations in your area.