

Analysis Report: Sales Call Flow Training

Introduction

This document covers the terminal objectives, strategy, statement of work and project management for the Sales Call Flow training.

Terminal Objectives

- Given several examples from one of the Sales Call Flow steps, learners will identify the correct example by circling it on the interactive whiteboard.
- Given the Manage Objections step of the Sales Call Flow, learners will demonstrate how to manage objections as an inbound sales associate in a role play.

Target Audience

The target audience for this training is inbound sales associates.

Training Length

The training length is one hour.

High Level Outline

Content		Delivery Method	Delivery Time (min)
1	Introduction • Welcome learners • Hand out job aids • Explain expected training outcomes while referring to terminal objectives	Classroom Presentation	5
2	Sales Call Flow Game This is a gamified activity using an interactive whiteboard. Learners can reference their job aids during the game.	Interactive Whiteboard	15

	Game flow: 1. Learners are divided into two teams with 6 on each team. 2. One contestant from each team approaches the whiteboard. Each learner takes a pen. 3. The instructor uses the whiteboard software on their computer to enable three examples to appear on the whiteboard for the first Sales Call Flow step. One example is correct, and two are incorrect. 4. Immediately after the examples appear, contestants must tap a virtual buzzer with their pen. Whoever taps first gets to circle an example. They earn points for their team if they circle the correct example, and receive no points for circling an incorrect example. 5. The timer widget allows 10 seconds to select an example. 6. If one contestant selects an incorrect example, the other contestant has one chance to answer correctly. Each contestant's team can call out what they think is the correct example. 7. The scoring widget on the whiteboard automatically adjusts the score, and the contestants sit down. 8. Two new contestants come up, one from each team, and steps 1 to 6 are repeated (note: for Step 3, examples from subsequent sales call flow steps will be shown). 9. The game concludes after all learners have had a chance to play.		
3	Sales Call Flow - Manage Objections • Learners listen to an actual recorded call between an inbound sales associate and a customer related to managing objections. • The instructor asks for learners to call out what the associate did well and what they could have improved upon. • Learners can refer to their job aid for tips on how the associate could have better managed objections.	Demonstration - Recorded Call	10
4	Role Play - Manage Objections The role play will be on the Manage Objections step of the Sales Call Flow, as this is the most difficult step associates will encounter. Learners will practice role plays on the other steps in later classroom sessions.	Role Play - Small Groups	25

	Role play flow: 1. Learners get in four groups of 3 people. 2. Learners select a role: associate, customer, or observer. 3. The learners playing the associate and customer roles refer to their handout on example dialogue to use. 4. The observer takes notes on the interaction — what went well, and what could be improved upon. 5. The observer briefly shares their observations. 6. The instructor alerts teams to switch roles, until each learner has had a chance to play each role.		
5	Debrief • The instructor asks for volunteers to approach the whiteboard and write down how well they feel they met the terminal objectives, and what they could have improved upon. • The instructor leads a short discussion on what was written down.	Classroom Discussion	5

Statement of Work

The training team will develop the following assets. Development times are approximate.

Assets		Development Time (hours)
1	Instructor Guide (contains facilitation notes)	30
2	Learner Job Aid (contains Sales Call Flow steps with examples)	8
3	Whiteboard Content (includes Sales Call Flow examples, graphics, etc.)	7

Project Milestones

These are the preliminary milestones for the analysis, design, development and deployment of the training.

Asset	July 5	July 8	July 12	July 15	July 20	July 22	July 26
Instructor Guide	Gather content/ prototype	Gather content/ prototype	Alpha Dev/Signoff	Beta Dev/Signoff	Gold Dev/Signoff	Testing	Deployment
Learner Job Aid	Gather content/ prototype	Alpha Dev/Signoff	Beta Dev/Signoff	Gold Dev/Signoff	Testing	Deployment	
Smart Board Content	Gather content/ prototype	Alpha Dev/Signoff	Beta Dev/Signoff	Gold Dev/Signoff	Testing	Deployment	

Project Scope

The following items are considered **in-scope** for this training project:

- Training assets described in this document
- Content updates that are required by stakeholders before the completion of the project

The following items are considered **out-of-scope** for this training project:

- Development of any training assets not outlined in this document
- Content changes requested after the training has been approved by stakeholders

Project Dependencies

Completion of the deliverables outlined in this document is dependent on the following:

- The instructional designer has access to source materials required to create assets before beginning design/development.
- Subject matter experts (SMEs) and stakeholders are available to answer content questions within prescribed timeframes.
- Content reviews and approvals are completed within prescribed timeframes.
- The instructor has logon credentials to whiteboard software before classroom training.

Risks

Project risks include the following:

- Any changes to the Sales Call Flow may impact timelines.
- Lack of SME availability may impact timelines.

- Failure to meet timelines may mean losing development resources, de-scoping items from timelines, and extending timelines and project hours.

Roles

Name	Title
TBD	Project Manager
TBD	Design Manager
TBD	Instructional Designer
TBD	SME
TBD	Stakeholder