



This page provides **Manager's Notes for Participant Handout Page 1**. Use as a reference and guide for planning and leading an interactive sales meeting or coaching session. It is meant to be a general guide and not a script. Add your own examples and wording.

<b>Manager's Notes for Participant Handout Page 1</b>		Notes
<b>General Statistics and Applicability to Your Organization</b>		
<b>Estimated Time</b>	20 minutes	
<b>Purpose/Objectives of this page</b>	<ol style="list-style-type: none"> <li>1. State the overall purpose of the teaching session (see comment #1 in Teaching Tips and Suggested Sequence that is shown below).</li> <li>2. Mutually agree as a sales team on how we will benefit if we improve retention.</li> </ol>	
<b>Teaching Tips and Suggested Sequence</b>	<ol style="list-style-type: none"> <li>1. Begin this teaching session by saying something like, "The purpose of this segment of the sales meeting or coaching session is to improve our ability to retain existing customers and products, and to save wounded customers from leaving us."</li> <li>2. Ask everyone to read page 1 and to then individually answer the two questions at the bottom of the page: "<b><i>How might you modify this definition to fit our company</i></b>" and "<b><i>How would it help us to increase customer and product retention?</i></b>" Allow about 10 minutes or less in total to start the session, have them read page 1, and individually answer the two questions at the bottom of page 1.</li> <li>3. Divide the sales team into pairs. If you have an odd number of people, form one trio. Each pair/trio should take a few minutes to share their individual answers with one another.</li> <li>4. You facilitate a large group report-out discussion by asking each pair/trio to share their answers to these two questions. Make some additional comments of your own. Depending on the size of the group, this step might take 5 minutes or so.</li> <li>5. Say that "We'll use the <b>Customer Retention &amp; Recovery Video</b> as a way to reinforce and summarize the teaching information in your handout." Start the Customer Retention &amp; Recovery Video and play all of Video Segment #1. Pause it at the suggested time. This video segment takes a few minutes. <u>Note:</u> The first segment of the Video continues on to pages 2 and 3 of the participant handout so use the next two pages of Manager's Notes as a guide for this first video segment.</li> </ol>	