

**ON - THE - JOB TRAINING RECORD
CONTINUATION SHEET**

Date of Training: _____

Lesson Category: Pre-Call Planning

Lesson Title: How to Effectively Prepare for the Appointment

Student Materials/Activities:

1. Students were instructed to listen to the audio “How to Effectively Prepare for the Appointment.”
2. Students were instructed to complete the Sales Success Worksheet.

Learning Objectives:

1. To identify and discuss four ways pre-call planning can pay off.
2. To identify and discuss four potential sources of information about your target markets.
3. To identify and discuss the “Dozen Truths” related to pre-call planning.
4. To identify and discuss the four key roles present in a recruiting transaction.
5. To have the participants discuss their experiences with pre-call planning.

Lesson Outline:

1. Identify and discuss four ways pre-call planning can pay off.
 - a. It increases your confidence during the sales presentation.
 - b. You’ll come across as more knowledgeable and professional.
 - c. You will have developed a strategy or game plan for the call.
 - d. You have a much greater chance to make the sale or gain the support of an influencer.
2. Identify and discuss four potential sources of information about your target markets.
 - a. Internet
 - b. Other recruiters who may have had prior contact with the lead or applicant
 - c. Internal advocates who have contact with your target markets
 - d. Clubs, associations and community-based organizations
3. Identify and discuss the “Dozen Truths” related to pre-call planning.
 - a. What is the formal and informal structure of the school, military unit, business or community-based organization I plan to visit? If I’m meeting with a lead or applicant, will someone else play a role in the decision-making process?
 - b. What type of decision-making process is this lead or applicant going to use, and where are they in that process? Are they just beginning to look at military service, or have they been thinking about it for a while?
 - c. What is their availability to meet the participation requirements of the Air Force Reserve?
 - d. What is their time-frame for making a decision?
 - e. If they are prior military, what service were they in and why might they have separated? If they are non-prior service, why were they attracted to the Air Force Reserve?
 - f. Who is my competition? If it’s another branch of the military, do I know the name of the recruiter I’m competing against?
 - g. What are the greatest strengths of my competition?
 - h. What weaknesses do my competitors have that I can exploit?
 - i. What is the incentive history of my competition?
 - j. How do their incentives compare to ours?
 - k. What kinds of solutions or benefits might they be looking for?
 - l. What kinds of things might they not want to change from their current situation or lifestyle?
4. Identify and discuss the four key roles present in a recruiting transaction.
 - a. Buffer: Keeps you from the lead or applicant
 - b. Lead or Applicant: The person you’re trying to convince to join the Air Force Reserve
 - c. Decision-maker: The person who has final approval
 - d. Internal advocate: The person who can help you the most
5. Using the Sales Success Worksheet and the questions on page 2 of the Manager’s Meeting Guide, the leader will conduct a guided discussion concerning some of the participants’ experiences with pre-call planning.

LAST NAME - FIRST NAME - MIDDLE INITIAL