

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

Date of Training: \_\_\_\_\_

Lesson Category: Pre-Call Planning

Lesson Title: Pre-Call Planning in a Nutshell

Student Materials/Activities:

1. Students were instructed to listen to the audio "Pre-Call Planning in a Nutshell."
2. Students were instructed to complete the Sales Success Worksheet.

Learning Objectives:

1. To identify the three pre-call planning questions recruiters should ask themselves before each sales interview.
2. To discuss why it's important to establish a goal for each sales call.
3. To discuss how to handle resistance to your recommendations or the commitment.
4. To discuss some of the "actions" you might want from your leads and applicants at the end of the call.
5. To have the participants apply the three pre-call planning questions to a lead or applicant they will be interviewing during their next sales call.

Lesson Outline:

1. Identify the three pre-call planning questions recruiters should ask themselves before each sales interview.
  - a. What do you want to accomplish on this call/appointment/interview?
  - b. How will you handle resistance (to your recommendations or the commitment)?
  - c. What action do you want from your lead or applicant at the end of the call/appointment/interview?
2. Discuss why it's important to establish a goal for each sales call.
  - a. Having a goal makes it easier for you to tell your lead or applicant exactly what's going to happen during the interview.  
(Statement of Intention)
    - b. If you align the goal of your meeting with the steps of the IMPACT selling process, you will increase the likelihood of a successful interview.
3. Discuss how to handle resistance to your recommendations or the commitment.
  - a. Sell value
  - b. Know how to present the commitment (benefits-stacking)
  - c. Have a fallback position – be prepared to offer alternative solutions
4. Discuss some of the "actions" you might want from your leads and applicants at the end of the call.
  - a. Test and physical
  - b. Meet with other unit members
  - c. Return to listen to your recommendations
  - d. Bring their spouse or parents to relieve their fears and concerns
5. Using the Sales Success Worksheet, discuss the participants' responses on their worksheets and conduct a guided discussion using the questions on page 2 of the Manager's Meeting Guide.

LAST NAME - FIRST NAME - MIDDLE INITIAL