

Create-a-Role-Play Handout #1

INSTRUCTIONS

Purpose and Overview

The Create-a-Role-Play activity is designed so that you can practice planning, using and receiving feedback on your Needs Based Selling skills in realistic situations. It should be used for the **Benchmark Role Play for Session 1**.

These same handouts can also be used to prepare, do, and review a role play activity for Sessions 2, 3, 4, and 5 in the Needs Based Selling for Banks Online Series.

Instructions for Planning Process

The role play activity can be done in pairs or small groups. If done in pairs, take turns playing the role of Salesperson and Customer. If done in small groups, take turns as Salesperson, Customer and Observer. **Print enough copies of the forms in handouts 1 and 2 for each person to practice each role.**

1. **Complete page 2 of this handout in order to create a realistic role play situation.** Refer to the Sample Situation on page 3 as an example on how to fill this out. You will be the Salesperson for this situation. One of your colleagues will act as the Customer.
2. In order to prepare to role play as the Salesperson, **complete the Salesperson's Planning Form on page 4.** You will use your notes on page 4 when you are the Salesperson for your role play situation. One of your colleagues will act as the Customer. **(Variation: If you are using the Create-a-Role-Play activity for NBS Online Sessions #2, 3, 4, or 5, you can use the e-Planning form from those sessions as your planning form instead of page 4).**
3. **After completing Steps 1 and 2 shown above, turn to Create-a-Role Play Handout 2 for additional instructions.**

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SALESPERSON - CREATE YOUR OWN SALES SITUATION

Sales Situation

1. Type of target customer (business or individual/family; new or existing customer of your bank; and so on)

2. Bank product/service (checking account, home equity loan, investment, etc.)

3. Competitive situation (if relevant, another bank or option that the customer is considering)

4. Other important background information (for example, how well do you know this customer?)

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SAMPLE SITUATION

Sales Situation

1. Type of target customer (business or individual/family; new or existing customer of your bank; and so on)

Current customer who has a long-term CD for \$5,000 that is about to mature.

2. Bank product/service (checking account, home equity loan, investment, etc.)

Opportunity to renew the CD and to cross-sell to one of our other products (such as a checking account or other investment).

3. Competitive situation (if relevant, another bank or option that the customer is considering)

Assume that the customer is also considering a large bank.

4. Other important background information (for example, how well do you know this customer?)

The customer doesn't know much about investments. I do not know this person well.

What questions will you ask to identify the customer's needs?

What information will you provide to this customer about relevant products/services?

What action or next steps would you like the customer to take?

What follow up actions, if any, might be appropriate for this sales situation?

What objections do you anticipate with this customer? How would you respond?

What might you do to build or strengthen the relationship with this customer?