Create-a-Role-Play Handout #2

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.

You must fill out Create-a-Role-Play Handout #1 before doing the instructions shown below.

Instructions for Doing and Reviewing the Role Play Activity

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.**

After the person playing the Salesperson completes Create-a-Role-Play Handout #1 and creates his/her sales situation, follow this procedure:

1. **The Salesperson reads aloud to the Customer and Observer(s) the information from page 2 of Handout #1**. The Salesperson answers any questions about his/her sales situation. NOTE: Customer and Observer(s) DO NOT read the Salesperson's Planning Form on page 4 of Handout #1.

2. **The Customer should complete confidentially page 2 of this handout**. NOTE: The Salesperson DOES NOT see this information. Page 3 is an example of what the Customer might write.

3. **Now conduct the first role play activity**, which consists of the Salesperson and Customer doing a sales call for a maximum of 5 minutes. The Observer watches and acts as the timekeeper.

4. If possible, the role plays should be **audiotaped or filmed** to allow you to self-critique later. It also allows the other people to provide you with additional feedback.

5. At the conclusion of the first role play, the **Customer and Observers fill out the Feedback Form on page 4** of this handout. Make additional copies of page 4 as needed. Verbal and written feedback should be given to the Salesperson.

6. **Now, repeat the process shown above (steps 1 to 5) for the next person in your group.** Use the next person's sales situation that he/she created.

7. If you audiotaped or filmed the role plays, listen/watch them after everyone is finished. **Additional feedback** can be provided when you listen or watch the recorded role plays.

CUSTOMER INFORMATION

Confidential Information (Important: This page should be filled out by the person who will act in the "Customer" role. The Salesperson does not know this information prior to the role play activity)

1. What might make this particular situation difficult?

2. What objections might this customer have?

SAMPLE SITUATION

CUSTOMER INFORMATION

Confidential Information (the customer knows this but the salesperson does not)

1. What might make this particular situation difficult?

This customer had a prior bad experience with another representative at your bank when the customer first moved to town.

2. What objections might this customer have?

How safe is my money?

Your rates aren't as good as a competitive bank.

FEEDBACK FORM

1. **What was done well?** (used customer's name; positive attitude; asked questions; listened and summarized needs; presented benefits, not features; cross sold if appropriate; used promotional material effectively; asked for a next step or action by the customer; handled any objections that arose)

2. **What suggestions do you have for improvement?**