Government of Pakistan

National Vocational and Technical Training Commission

Prime Minister's Hunarmand Pakistan Program

"Skills for All"

Course Contents / Lesson Plan

Course Title: Customer Services and Sales Representative

Duration: 3 Months

Revised Edition

Trainer Name	
Course Title	**Customer Services and Sales Representative**
Objectives and Expectations	**Employable skills for students having minimum SSC qualification through an intensive course on Customer services & sales representatives and its Application.** This is a special course designed to address unemployment in the youth. The course aims to achieve the above objective through hands on practical training delivery by a team of dedicated professionals having rich market/work experience. This course is therefore not just for developing a theoretical understanding/back ground of the trainees. Contrary to that, it is primarily aimed at equipping the trainees to perform commercially in a market space in independent capacity or as a member of a team. The course therefore is designed to impart not only technical skills but soft skills as well as entrepreneurial skills deemed essential for that purpose i.e. communication skills; marketing skills (including freelancing); personal grooming of the trainees and inculcation of the positive work ethics to foster better citizenship in general and improve the image of Pakistani work force in particular. **Main Expectations:** In short, the course under reference should be delivered by professional instructors in such a robust hands- on manner that the trainees are comfortably able to employ their skills for earning money (through wage/self-employment) at its conclusion.

This course thus clearly goes beyond the domain of the traditional training practices in vogue and underscores an expectation that a market centric approach will be adopted as the main driving force while delivering it. The instructors should therefore be experienced enough to be able to identify the training needs for the possible market roles available out there. Moreover, they should also know the strengths and weaknesses of each individual trainee to prepare them for such market roles during/after the training.

i. Specially designed practical tasks to be performed by the trainees have been included in the **Annexure-I** to this document. Their weekly distribution has also been indicated in the weekly lesson plan given in this document. The record of all tasks performed individually or in groups must be preserved by the management of the training Institute clearly labeling name, trade, session etc so that these are ready to be physically inspected/verified through monitoring visits from time to time. The weekly distribution of tasks has also been indicated in the weekly lesson plan given in this document.

ii. In order to materialize the main expectations, a special module on **Job Search & Entrepreneurial Skills** has been included in the course through which, the trainees will be made aware of the Job search techniques in the local as well as international job markets (Gulf countries). Awareness around the visa process and immigration laws of the most favored labour destination countries also forms a part of this module. Moreover, the trainees would also be encouraged to venture into self-employment and exposed to the main requirements in this regard. It is also expected that a sense of civic duties/roles and responsibilities will be inculcated in the trainees to make them responsible citizens of the country.

iii. A module on **Work Place** Ethics has also been included to highlight the importance of good and positive behavior at work place in the line with the best practices elsewhere in the world. An outline of such qualities has been given in the Appendix to this document. Its importance should be conveyed in a format that is attractive and interesting for the trainees such as through PPT slides + short video documentaries. Needless to say that if the training provider puts his heart and soul into these, otherwise non-technical components, the image of Pakistani workforce would undergo a positive transformation in the local as well as international job markets.

	In order to maintain interest and motivation of the trainees throughout the course, modern techniques such as: • Motivational lectures • Success stories • Case studies These would be employed as additional training tools wherever possible (these are explained in the subsequent section on Training Methodology). Lastly, evaluation of the competencies acquired by the trainees will be done objectively at various stages of the training and proper record of the same will be maintained. Suffice to say that for such evaluations, practical tasks would be designed by the training providers to gauge the problem solving abilities of the trainees. To maintain interest and motivation of the trainees throughout the course, modern techniques such as: • Motivational Lectures • Success Stories • Case Studies These techniques would be employed as an additional training tool wherever possible (these are explained in the subsequent section on Training Methodology). Lastly, evaluation of the competencies acquired by the trainees will be done objectively at various stages of the training and a proper record of the same will be maintained. Suffice to say that for such evaluations, practical tasks would be designed by the training providers to gauge the problem-solving abilities of the trainees. **(i) Motivational Lectures** The proposed methodology for the training under reference employs motivation as a tool. Hence besides the purely technical content, a trainer is required to include elements of motivation in his/her lecture. To inspire the trainees to utilize the training opportunity to the full and strive towards professional excellence. Motivational lectures may also include general topics such as the importance of moral values and civic role & responsibilities as a Pakistani. A motivational lecture should be delivered with enough zeal to produce a deep impact on the trainees. It may comprise of the following: • Clear Purpose to convey the message to trainees effectively. • Personal Story to quote as an example to follow. • Trainees Fit so that the situation is actionable by trainees and not represent a just idealism. • Ending Points to persuade the trainees on changing themselves. A good motivational lecture should help drive creativity, curiosity, and spark the desire needed for trainees to want to learn more. The impact of a successful motivational strategy is amongst others commonly visible in increased class participation ratios. It increases the trainees’

	willingness to be engaged on the practical tasks for a longer time without boredom and loss of interest because they can see in their mind's eye where their hard work would take them in short (1-3 years); medium (3 -10 years) and long term (more than 10 years). As this tool is expected that the training providers would make arrangements for regular well planned motivational lectures as part of a coordinated strategy interspersed throughout the training period as suggested in the weekly lesson plans in this document. Course-related motivational lectures online link is available in **Annexure-II**. **(ii) Success Stories** Another effective way of motivating the trainees is using Success Stories. Its inclusion in the weekly lesson plan at regular intervals has been recommended till the end of the training. A success story may be disseminated orally, through a presentation, or using a video/documentary of someone that has risen to fortune, acclaim, or brilliant achievement. A success story shows how a person achieved his goal through hard work, dedication, and devotion. An inspiring success story contains compelling and significant facts articulated clearly and easily comprehendible words. Moreover, it is helpful if it is assumed that the reader/listener knows nothing of what is being revealed. The optimum impact is created when the story is revealed in the form of:- • Directly in person (At least 2-3 cases must be arranged by the training institute) • Through an audio/ videotaped message (2-3 high-quality videos must be arranged by the training institute) It is expected that the training provider would collect relevant high-quality success stories for inclusion in the training as suggested in the weekly lesson plan given in this document. The suggestive structure and sequence of a sample success story and its various shapes can be seen in **Annexure III**. **(iii) Case Studies** Where a situation allows, case studies can also be presented to the trainees to widen their understanding of the real-life specific problem/situation and to explore the solutions. In simple terms, the case study method of teaching uses a real-life case example/a typical case to demonstrate a phenomenon in action and explain theoretical as well as practical aspects of the knowledge related to the same. It is an effective way to help the trainees comprehend in depth both the theoretical and practical aspects of the complex phenomenon in depth with ease. Case teaching can also stimulate the trainees to participate in discussions and thereby boost their confidence. It also makes the classroom

	atmosphere interesting thus maintaining the trainee interest in training till the end of the course. Depending on suitability to the trade, the weekly lesson plan in this document may suggest case studies be presented to the trainees. The trainer may adopt a PowerPoint presentation or video format for such case studies whichever is deemed suitable but only those cases must be selected that are relevant and of a learning value. The Trainees should be required and supervised to carefully analyze the cases. For this purpose, they must be encouraged to inquire and collect specific information/data, actively participate in the discussions, and intended solutions to the problem/situation. Case studies can be implemented in the following ways: - i. A good quality trade-specific documentary (At least 2-3 documentaries must be arranged by the training institute) ii. Health &Safety case studies (2 cases regarding safety and industrial accidents must be arranged by the training institute) iii. Field visits(At least one visit to a trade-specific major industry/ site must be arranged by the training institute)
Entry-level of trainees	Matric
Learning Outcomes of the course	By the end of this course, students will be able to: • Understand and explain the role of a Customer Service in an overall business • Relate the understanding of Customer Services with the context of real work environment • Formulate smart goals and plans to fulfill his/her tasks and improve the performance. • Serve the Customers with a positive service mindset • Use problem solving approach to engage and satisfy the customers • Apply relevant strategies to deal with different types of customers • Exhibit effective verbal and nonverbal communication skills • Provide Tele-customer services • Understand and explain the role of a Sales Officer in an overall business • Explain the key knowledge, skills and values required by a sales officer • Relate the understanding of Sells Steps and Sales Cycle with the context of real work • Apply Sales Steps in the work • Use different selling techniques at work • Develop and implement sales plans • Initiate and build sales relationships • Demonstrate positive thinking and professionalism during work

	• Make effective sales presentations • Undertake Tele-sales tasks
Course Execution Plan	The total duration of the course: **3 months (13 Weeks)** Class hours: **4 hours per day** Theory: **20%** Practical: **80%** Weekly hours: **20 hours per week** Total contact hours: **260 hours**
Companies offering jobs in the respective trade	• Pharmaceutical companies • Telecom companies • Multinational Companies • Hospitals • Hotel and tourism industry • Brand Outlets • Customer Services Centers • Whole-sale and retails centers • Shopping malls
Job Opportunities	• Front Desk Officer • Customer Service Officer • Sales Officer/Assistant / Representative c. Call Centre Agent/ Supervisor • Tele Sales Representative e. Office Assistant
No of Students	25
Learning Place	Classroom / Lab
Instructional Resources	**Free Online Customer Service Courses** https://alison.com/tag/customer-service?utm_source=google&utm_medium=cpc&utm_campaign=PPC_Tier-4_First-Click_Courses-_Broad_&utm_adgroup=Tag_Customer-Service&gclid=CjwKCAjwg-GjBhBnEiwAMUvNW4DD1wahaFprhWw7A29FJmCe9imyK-ITgAKVOGohSVYa-TOGAFUmpxoC1BcQAvD_BwE **The Ultimate Guide to Training for Customer Service & Support** https://blog.hubspot.com/service/customer-service-support-training

WEEKLY SCHEDULE OF TRAINING

Scheduled Week	Module Title	Learning Units	Remarks
Week 1	**Orientation**	• Program Orientation • Course orientation • **Motivational Lecture** (For further detail please see Page No: 5-6) • Course benefits • Job market • Introduction to Marketing • Introduction to Customer Services • Introduction to Sales management • Rules and regulations • **Institute/Work ethics** (For further detail please see Annexure-II at the end)	
Week 2	**Introduction to Customer Service and Sales**	• Overview of customer service and sales roles • Importance of customer service in business • Effective communication skills for customer service representatives • Introduction to sales techniques and strategies • Role-playing exercises for customer interactions	**Task-1** (Details may be seen at Annexure 1)
Week 3	**Understanding Customer Needs**	• **Success story** (For further detail please see Page No: 6) and Annexure-III at the end) • Identifying customer expectations and needs • Active listening techniques • Asking effective questions to gather customer information • Developing empathy and building rapport with customers	**Task-2** (Details may be seen at Annexure 1)

		• Case studies and group discussions on handling different customer scenarios	
Week 4	**Product Knowledge and Upselling Techniques**	• **Motivational Lecture** (For further detail please see Page No: 3-4) • In-depth understanding of the products or services being offered • Features and benefits of the products • Cross-selling and upselling techniques • Overcoming objections and handling customer concerns • Role-playing exercises for upselling scenarios • **Institute/Work ethics** (For further detail please see Annexure-II at the end)	**Task-2** (Details may be seen at Annexure 1)
Week 5	**Effective Customer Engagement**	• Effective telephone etiquette • Handling customer inquiries and complaints • Dealing with difficult customers and resolving conflicts • Time management and prioritization skills • Developing problem-solving skills in a customer service context • **Case Study** (For further detail please see Page No: 5-6)	**Task- 3** (Details may be seen at Annexure 1) **1st Monthly Test**

Week 6	**Workplace Communication , Sales Strategies and Closing Techniques**	• **Motivational Lecture** (For further detail please see Page No: 3-4) • Workplace Communication • Different sales approaches and strategies • Building trust and credibility with customers • Effective negotiation techniques • Overcoming objections and closing the sale • Case studies and role-playing exercises for sales scenarios • **Success story** (For further detail please see Page No: 4-5) and Annexure-III at the end)	**Task- 4** (Details may be seen at Annexure 1)
Week 7	**Understanding Customers and Building Customer Loyalty**	• Understanding Customers • Importance of customer loyalty in sales and business growth • Creating positive customer experiences • Techniques for handling customer feedback and reviews • Customer retention strategies • Developing long-term customer relationships	**Task-5** (Details may be seen at Annexure 1)

		• **Case Study** (For further detail please see Page No: 5-6)	
Week 8	**Customers Record, Sales Analytics and Reporting**	• **Motivational Lecture** (For further detail please see Page No: 3-4) • Introduction to sales metrics and key performance indicators (KPIs) • Tracking and analyzing sales data • Sales forecasting techniques • Developing sales reports and presentations • Practical exercises on interpreting sales data and making informed decisions • **Success story** (For further detail please see Page No: 4-5) and Annexure-III at the end)	**Task-6** (Details may be seen at Annexure 1) **2nd Monthly Test**
Week 9	**Handling Sales Objections and Closing Deals**	• Identifying and overcoming common sales objections • Techniques for addressing customer concerns and doubts • Negotiation strategies for closing deals • Effective follow-up and post-sales activities • Role-playing exercises for objection handling and deal closing	**Task- 7** (Details may be seen at Annexure 1)

Week 10	**Customer Service in the Digital Age**	• Leveraging technology for customer service and sales • Using customer relationship management (CRM) systems • Personalizing customer interactions through data analysis • Online reputation management and handling online reviews • Case studies on successful digital customer service and sales strategies • **Case Study** (For further detail please see Page No: 5-6)	**Task-7** (Details may be seen at Annexure 1)

Week 11	**Customer Service Leadership and Teamwork**	• Leadership skills for customer service representatives • Effective teamwork and collaboration in customer service teams • Training and mentoring new team members • Managing conflicts within a team • Group activities and discussions on leadership and teamwork • **Success story** (For further detail please see Page No: 4-5)and Annexure-**III** at the end)	**Task-8** (Details may be seen at Annexure 1)
Week 12	**Continuous Improvement and Professional Development**	• **Motivational Lecture** (For further detail please see Page No: 3-4) • Strategies for continuous improvement in customer service and sales • Seeking feedback and implementing improvements • Professional development opportunities in the field • Setting personal and career goals	
Week 13	• Course Review • Presentation on field project assignments • Preparation for starting career as a customer & sales Representative • Final Term Examination /Assessment		

Annexure-I

Tasks for Customer Services & Sales Representatives

Note: The following tasks are required to be performed multiple times by each trainee/group until sufficient proficiency level is acquired. The trainer is required to determine the number of times the task needs to be repeated by a trainee as per his/her low/medium/high level of skill and proficiency during any stage of the course.

Task 1:

Introduction to marketing

Exercise

Role plays and group discussions.

Training materials /equipment required:

Charts, Markers

Preparation Required: During the break before this session, ask for 8 volunteers. Explain to the volunteers that they will be involved in a role-play in the next session. Explain to them the role-plays and give them time to prepare.

Step I

Introduce trainees to the session.

Define with the team what is considered on small scale-business. Ask them to list some of the small-scale businesses they know.

Tell them that they will watch 2 role-plays. Ask them to record the problems faced by small-scale businesses and strengths of small scale as depicted in the two role-plays.

Step II

Invite group II to present their role-play.

Invite group I to present their role-pla

Step III

In plenary ask the team to list the problems and importance of small scale businesses mentioned in the two role-plays. Record all the feedback on the Charts.

Step IV

Compare the information recorded to those on the facilitator’s notes and add what has not been recorded then, summarize challenges and strengths of small scale businesses. Ask the trainees to discuss question 1 in groups

Discussion Notes

1: How can we make our small businesses survive? Or What are the possible solutions to challenges faced by small scale businesses?

2. What happens in your situations? What problems do your businesses face?

3. Why do you think you face these problems?

Instructor Notes

Many times, small-scale businesses are largely practiced, and they often face a number of challenges Characteristics and examples of small-scale businesses:

- Produce and sell in small scale
- Less use of heavy machinery
- Belong to individuals and small groups and small associations Role play

Divide the volunteers into two groups and explain to them the following:

Group 1: Challenges for Small scale Businesses

Assume the role of an entrepreneur. Discuss among themselves the problems faced by small scale entrepreneurs. Practice to act this for presentation in the plenary

Key items to capture

- Product quality, acceptability, price and availability
- Packaging
- Method of selling (how selling is done)
- Awareness and effective promotion of the product
- Profitability
- Maintenance (Problems easily eat away capital)

Group II: Strengths of small-scale businesses

Tell them that they will discuss and act out the strengths of small-scale businesses. Practice to act this for presentation in the plenary

Key items to capture

- Requires minimum capital to start
- Easy to manage, monitor and control
- Quality control is easy
- Can be practiced anywhere including rural areas

Ask the trainees to write their problems and keep them for the handout 'introduction to marketing - session on problem solving'. Effective marketing involves dealing with the problems faced.

EXPERIENCE SHARING

- Small businesses need to be run as business in order to survive
- For development activities – marketing aspect of interventions is important
- Sustainable marketing is obtained by allowing the commercial element
    - Profitable
    - Carried out by independent
    - Indigenized
    - Improved levels of skills

Task2

Organization's Product/services Range

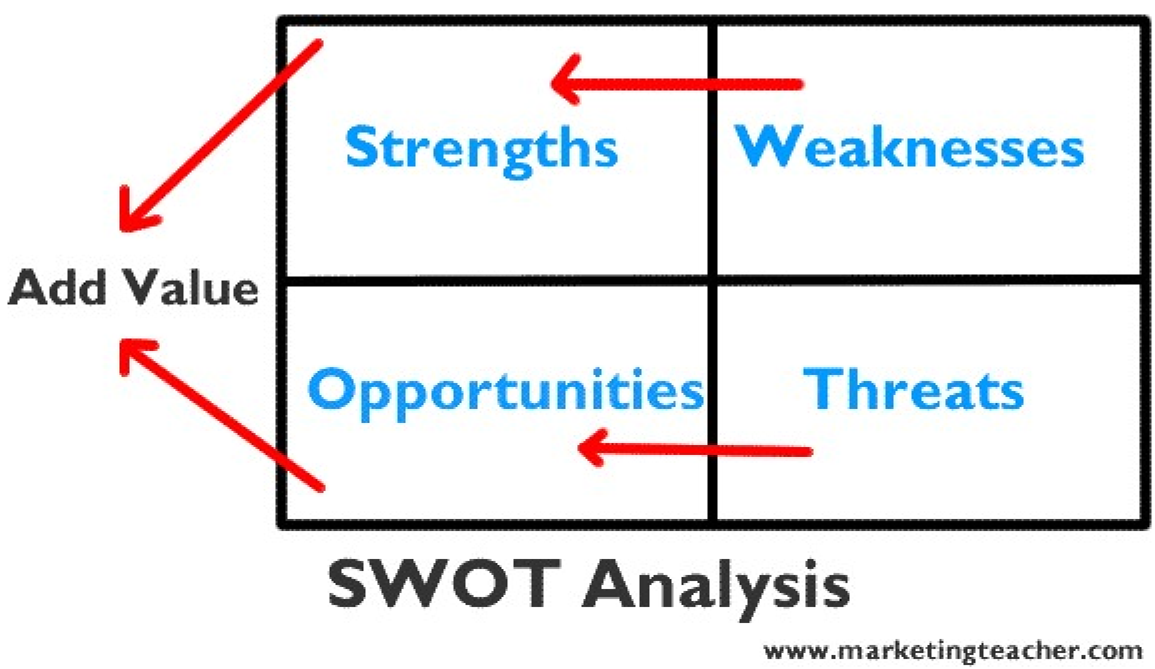
Exercise SWOT analysis

Exercise:

Trainees will Divided into groups and will be ask to do SWOT analysis of any organization/business they have selected

SWOT analysis is a tool for auditing an organization and its environment. It is the first stage of planning and helps marketers to focus on key issues. SWOT stands for strengths, weaknesses, opportunities, and threats. Strengths and weaknesses are internal factors. Opportunities and threats are external factors. A strength is a positive internal factor. A weakness is a negative internal factor. An opportunity is a positive external factor. A threat is a negative external factor.

Diagram: A SWOT Analysis



The main purpose of the analysis has to be to add value to our products and services so that we can recruit new customers, retain loyal customers, and extend products and services to customer segments over the long-term. If undertaken successfully, we can then increase our Return On Investment (ROI).

Simple rules.

- Be realistic about the strengths and weaknesses of your organization.
- It should distinguish between where your organization is today, and where it could be in the future.
- It should always be specific. Avoid grey areas.
- Always apply the tool in relation to your competition i.e. better than or worse than your competition.
- Keep your audit short and simple. Avoid complexity and over analysis
- It is subjective.

Once key issues have been identified with your SWOT analysis, they feed into marketing objectives. The tool can be used in conjunction with other tools for audit and analysis, such as PEST analysis and Porter's Five-Force analysis. So SWOT is a very popular tool with marketing students because it is quick and easy to learn. During the SWOT exercise, list factors in the relevant boxes. It's that simple. Below are some FREE examples of SWOT analysis – click to go straight to them.

Strengths and weaknesses are internal factors.

For example:

- A strength could be:
- Your specialist marketing expertise.
- A new, innovative product or service.
- Location of your business.
- Quality processes and procedures.
- Any other aspect of your business that adds value to your product or service.
- A weakness could be:
- Lack of marketing expertise.

- Undifferentiated products or services (i.e. in relation to your competitors).
- Location of your business.
- Poor quality goods or services.
- Damaged reputation.

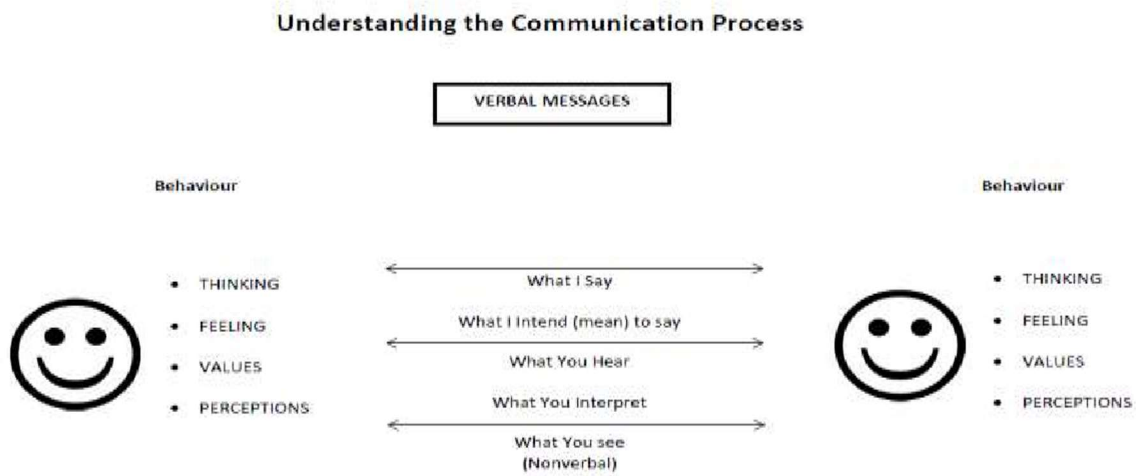
Opportunities and threats are external factors.

For example:

- An opportunity could be:
- A developing market such as the Internet.
- Mergers, joint ventures or strategic alliances.
- Moving into new market segments that offer improved profits.
- A new international market.
- A market vacated by an ineffective competitor.
- A threat could be:
- A new competitor in your home market.
- Price wars with competitors.
- A competitor has a new, innovative product or service.
- Competitors have superior access to channels of distribution.
- Taxation is introduced on your product or service.

Task 3:

- Communication Skills
- Verbal Communication and its uses.
- Formal vs Informal.
- Identify situations where formal and informal communication is used. Present an example of both.



Nonverbal Communication

1. Gestures
2. Body Language
3. Movement
4. Eye Contact
5. Tone
6. Facial Expressions

Impacted by:

1. How we feel
2. Whether or not we like the message
3. Who is delivering the message

Influencing Facial Expressions

1. Sadness
2. Anger
3. Surprise
4. Fear

5. Disgust
6. Contempt
7. Happiness

Task4

Workplace communication

Resource Material

https://dphu.org/uploads/attachements/books/books_4741_0.pdf

Unit-Tools for customer's communication

https://www.comm100.com/blog/customer-service-training-activities.html#step

Exercise:

Trainees will give opportunity to practically demonstrate the use of different tools used for Customer Communication

Conversations over the Telephone

It's not what you Say; it's how you Say It

The moment you pick up a telephone, body language and visual perceptions disappear and your tone of voice becomes dominant.

Almost the entire message you project to the customer over the phone is derived from tone of voice and attitude.

For example:

- A flat tone of voice says to the customer, "I don't like my job and would rather be elsewhere."
- Slow pitch and presentation say, "I am sad and lonely – do not bother me."
- A high pitch, rapid voice says, "I am enthusiastic and excited!'
- A loud voice says, "I'm angry and aggressive."

Telephone Etiquette

Telephone etiquette, unlike more varying body language, can be uniform and is not culturally based. The telephone is often the first or last place a customer comes in contact with an organization or company. Being telephone friendly is one of the least expensive and cost-effective ways to deliver better customer service.

Answering the Telephone

How a company answers the phone can tell the whole story of how they treat customers and employees. The correct phrase said in the right order in a positive tone leaves a good impression and starts the customer-client relationship off on the right foot.

Troubleshooting

Some things which may upset a customer are simply unavoidable. Here are some tips on how to best handle these situations.

"Putting a Customer on Hold"

Ask the customer if you can put them on hold; wait for them to say "yes" or "no" and then explain it will only be for a short period of time. Explain to customers why you are putting them on hold. Thank customers for holding.

"Transferring a Call"

Ask the customer if they mind being transferred; wait for them to say "yes" or "no" and explain why they are being transferred and to whom.

"Taking a Message"

Explain your co-workers absence in a positive light but do not be too specific. Explain that your co-worker is in a meeting, conference, briefing, or training. Do not say he or she is gravely ill, is too hung over to come to work, never called in today, can't be found, that you do not know where he or she is, or that he or she "was just here".

"Ending the Call"

This is the final step in good telephone etiquette. A good customer service representative ends the call on a positive note, repeating any actions agreed to be taken and what is going to be done to help or serve the customer.

Respond to your business email quickly!

Answering your business email promptly should be a priority for all business. Not only is e-mail an important communication line with your customers, it is often used by them to gauge that your trustworthy.

If a customer sends you an e-mail with a simple question, and you take forever to answer it, what does that say about the rest of your operation? It's one of the tell-tale signs customers use to separate men from boys. And we all want to play with the big guys, don't we?

Talking about the big businesses, surveys show that the Top-500 fail miserably at answering their business email. Jupiter Communications reported that 42% took more than 5 days to answer a simple question. In the world of Internet, that might as well have been forever. If a customer has to wait that long for an answer, most likely she will have taken their business elsewhere. 35% of companies don't even bother to answer at all. I guess, they just don't like customers ;-) Forrester Research is reporting figures that are similar.

So what is prompt answering your business email?

Business email should be answered within 24 hours max. No exceptions. At that rate, your doing a lot better than a lot of other businesses.

If you really want your customer service to shine, you should consider answering your business email twice a day with a 12 hour interval.

It is even better to check out your direct competition by sending them an e-mail as if you are a potential customer. Send them more than one on several days.

Task 5

Understanding Customer

Exercise:

Trainees will give opportunity to Role Play following types of customers in order to understand practically.

1. Lookers

Some visitors are “just looking.” They’re not after anything in particular. They’re having fun shopping and want to see what you have that might catch their attention. They may even have been looking for a different store, but got lost in all the mall traffic.

2. Bargain Hunters

Some shoppers have heard you’re having a sale. They want to see if they can find a bargain.

3. Buyers

Some people are there on a mission. They know exactly what they want, and they’re there to get it.

4. Researchers

Some are researching. They have a general idea of what they’re after, but they want to compare options and prices.

5. New Customers

Some are relatively new customers. They enjoyed their last visit to your store, and they’re back to find out more about what you offer.

6. Dissatisfied Customers

Some are there to return something. For some reason, a previous purchase didn't suit them. They want customer service.

7. Loyal Customers

Some are your best customers. They come back often and love shopping with you.

Is that a fair assessment of what a local store owner might determine by greeting shoppers for a day? Wouldn't this be valuable information

– especially if it would allow you to cater more to the particular needs of each?

Customer Handling Exercise

1. Don't look down on lookers

Lookers are enjoying the moment. If you can catch their attention and get them to stop long enough to consider an offer, you may be able to convert them now. It may take several visits to make that first sale, though, so don't be discouraged if they look around a bit and leave. That's what lookers do.

2. Keep bargain hunters happy

I'm not suggesting you engage in a price-slashing battle with your competitors – not at all – and discounting certainly isn't real conversion rate optimization. It's wise for most businesses, however, to be keenly aware of the thrill people feel when they get a discount. Even a small price adjustment or other special benefits can be enough to turn a "No" into a sale. Consider the research findings on the importance of free shipping. Nobody likes to pay full price for products. Every customers – even affluent customers – like to get a deal. Some need a deal before they'll buy.

3. Give your buyers a straight route to the purchase

Buying from you should be hassle-free. Clear every obstacle from your customers' path and give them what they want. Simplicity is always king when it comes to website navigation. Buyers don't need pop-up ads getting in their way or lengthy, friction-filled checkout procedures. They want to buy. They need to buy. Let them buy.

4. Help your researchers find what they seek

Do you ever do some basic research before deciding on a purchase? I sure do. Researchers need to feel they've adequately considered the options and they're making the right decision. Your job is to help them do that.

5. Welcome new customers back and treat them like gold

Make me feel like a celebrity for buying from you, and I'm very likely to be back for more. Ignore me, don't appreciate me, and that possibility sinks rapidly. New customers need to feel they made a wise decision, that you stand behind your products, and that you're glad they're your customers. Brick and mortar teams do that by being available to answer questions, with no-hassle returns, and by genuinely expressing gratitude to those who shop with them.

6. Listen closely to your dissatisfied customers

I admit that some people are difficult to deal with and impossible to please. Even though you can't make everybody happy, though, you should try. Irate customers who realize you can't magically make the garment fit them perfectly, but you'll certainly go over that sizing chart to make sure it's accurate, are often satisfied that you hear them and you'll try

Task 6

Customer Database

Develop Customer Database Using MS Excel

Customers	Company	Work Function	Phone	Email	Estimated Sale	Last Contact	Next Action	Next Contact	Lead Status	Lead Source	Notes
Wali uhammad	XYZ Plumbing	Owner	444-	@gmail.com	4,500	05-05-20		29-05-20	❄ Cold	Referral	
Waleed khan	ABC Corp	Sales Manager	222-		10,000	25-05-20		05-06-20	♨ Warm	Website	
Baber Ali	ACME	Business Dev.	111-		4,500.00	27-05-20		15-06-20	🔥 Hot	Email	Loves chocolate
	-	-	-	-							
	-	-	-	-							
	-	-	-	-							

<u>Instructions</u>

Update the Lead Status and Lead Source lists to change

What shows up in the drop-down lists in the CRM worksheet?

Edit the values in the green and yellow cells to change the settings used to conditionally format the Last Contact and Next Contact columns in the CRM worksheet.

The Cold/Warm Hot status cells use conditional formatting. If change these, you'll also need to update the conditional formatting rules.

How to use the Customer Database Template

Sorting and Filtering: This template is designed around the spreadsheet's built-in Sorting and Filtering features. With a couple clicks on the arrow in the column header, you can do things such as:

- Order the table based on the Estimated Sale value
- Filter out customers from the list where the Lead Status is "loss" or "cold"
- Sort the table by Next Contact date so you can make the most urgent contacts first

Demographics - For any contact, you'll want to record their name, company, job title or position, email, phone #, etc. Information that may be nice to know what not necessary to refer to on a day-to-day basis could be saved in the optional

Contact Details- worksheet (which is just the contact list added to this workbook).

Estimated Sale - For active customers, this might be the average monthly or annual sales figure - something to help you easily see the value of keeping that customer. For potential customers, this could be your estimate of the customer's potential monthly or annual sales.

Last Contact - When you make a contact, you record the date in the Last Contact field. The highlighting will make the cell green if the contact was recent, pink if it has been a long time since that last contact, or yellow for somewhere in between. Use the **Settings** worksheet to customize the number of days that are used for the basis for when the cell should be green/yellow/pink.

Next Contact - Planning follow-up communication is important, so use this column to record the date for the next contact and use the Next Action column to enter a code that describes what your follow-up action will be.

Notes - There are many ways that you can record notes about communications with your leads. You could add cell comments as shown in the screenshot image above. You can use a Notes column with Wrap Text turned on (though for long notes, that will make the table messy). You can also use the optional Contact Log worksheet, to record notes about each individual communication.

Sales Log - If you want to create monthly or quarterly or annual sales reports, you'll need a way to record individual sales. That could be done using the optional Sales Log worksheet. You could then add a Pivot Table to summarize the data, or create your own Excel dashboard to display important summary data.

Task 7

Deliver Sales Presentation

Trainees will practice preparation of sales presentation using different mediums.

How to Create a Powerful Sales Presentation

The quality of your sales presentation will often determine whether a prospect buys from you or one of your competitors. However, most presentations lack pizzazz and are seldom compelling enough to motivate the other person to make a buying decision. These seven tips will help you create a sales presentation that will motivate buyers.

1. Make the sales presentation relevant.

One of the most common mistakes people make is to use a generic presentation. They say the same thing in every presentation and hope that something in their presentation will appeal to the prospective customer. I have been victim to this approach more times than I care to remember having been subjected to many “canned” PowerPoint presentations.

2. Create a connection between your product/service and the prospect.

In a presentation to a prospective client, I prepared a sample of the product they would eventually use in their program. After a preliminary discussion, I handed my prospect the item his team would be using – instead of telling him about the item, I placed it in his hands. He could then see exactly what the finished product would look like and examine it in detail. He was able to ask questions and see how his team would use it in their environment.

3. Get to the point.

Today’s business people are far too busy to listen to long-winded discussions. Know what your key points are and learn how to make them quickly. I remember talking to a sales person who rambled at great length about his product. After viewing his product and learning how much it would cost I was prepared to move ahead with my purchase. Unfortunately, he continued talking and he almost talked himself out of the sale. Make sure you know what key points you want to discuss and practice verbalizing them before you meet with your prospect.

4. Be animated.

The majority of sales presentations I have heard have been boring and unimaginative. If you really want to stand out from the crowd make sure you demonstrate enthusiasm and energy. Use your voice effectively and vary your modulation. A common mistake made when people talk about a product they are very familiar with is to speak in a monotone - causing the other person to quickly lose interest in your presentation.

5. Use showmanship.

In The Sales Advantage, an example is given of a vending sales person laying a heavy sheet of paper on the floor, saying, “If I could show you how that space could make you some money, would you be interested?” Consider the impact of this approach compared to the typical approach of saying something like, “We can help you make more money.” What can you do to incorporate some form of showmanship into your presentation?

6. Use a physical demonstration.

A friend of mine sells sales training; he often uses the whiteboard or flip chart in the prospect’s boardroom during his presentation. Instead of telling his client what he will do, he stands up and delivers a short presentation. He writes down facts and figures, draws pictures, and records certain comments and statements from the discussion. This approach never fails to help his prospect make a decision.

7. Lastly, believe in your product/service.

Without a doubt, this is the most critical component of any presentation. When you discuss solutions, do you become more animated and energetic? Does your voice display excitement? Does your body language exhibit your enthusiasm? If not, you need to change your approach. After all, if you can’t get excited about your product, how can you expect your customer to become motivated enough to buy?

Task 8

Develop effective work habits

1. **Punctual.**

Be punctual for work. Even better, be early. Start the day feeling relaxed and settled.

2. **Initiative.**

Take the initiative to get things done, even if that means you have to fill up the kettle and boil the water — just do it.

3. **Neat, tidy and clean.**

Make sure your desk or workstation is neat, clean and pleasant. Clear perishable rubbish immediately and wash your mug at the end of the workday. The same attitude applies to the general office area and restrooms — use them considerately for others to enjoy as well.

4. **Organized.**

The best indicator is to see if your tray, desk, drawers and cabinets are cluttered and messy or well-labeled and orderly.

5. **Systematic.**

A good system smoothens work processes. Generally, established companies have a standard operating procedure (SOP) manual as a guideline. If all you have are verbal instructions, develop your own checklist of how a task should be done.

6. **Efficient.**

Some people are naturally efficient. You can develop this skill by thinking things through. By doing so, you will know how processes can be done in a faster, smarter and more convenient way.

7. **Problem solving.**

Understand what you are doing and improvise on existing work processes. Give feedback, ideas and suggestions to colleagues and clients to help them come up with solutions.

8. **Follow-up.**

This does not mean chasing people after a day's notice. Give them a gentle reminder after a space of three days. Most people understand urgency and will help you expedite matters if you underline the importance of the deadline. Always exercise diligence in matters of finance and when forwarding documents to a third party. Have a tracking system on your calendar.

9. **Fast.**

Learn to work fast on routine jobs. But this does not mean rushing to get things done.

10. **Accuracy.**

Learn to pay attention to details especially if you are dealing with numbers and dates.

11. **Fewer mistakes.**

Everybody makes mistakes, but you should aim to make fewer mistakes on routine jobs. Always be mindful that some mistakes come with a cost.

12. **Paperwork.**

Be good in your paperwork. Clear paperwork as soon as possible and keep all your files updated so that you have important details at your fingertips.

13. **Interpersonal.**

Be friendly, pleasant and have a positive attitude towards your colleagues and your boss. Don't show your temper, keep a long face or be sarcastic as it is totally unacceptable. Maintain a pleasant and upbeat telephone-voice when you make or take calls as this reflects the image of the company.

14. **Teamwork.**

Be a team player. Be willing to share ideas, work experience, information, templates and so on, so other colleagues won't have to re-invent the wheel. This is how you build trust with each other.

15. **Office etiquette.**

Don't spend too much time on personal calls, e-mails, text messages or tea breaks. Respect others' personal space and desk. Avoid using office paper and stationery for personal reasons.

16. **Writing.**

Work on your letter writing and report writing skills. The only way to do this is to write more.

17. **Reading.**

Equally important is the ability to read, comprehend and grasp the essentials — concepts, facts, figures and instructions.

18. **Priority.**

Know what is important and what can be shelved. Stay focused, keep to your deadlines, plan your work for the day and the week and allow some flexibility for last-minute projects.

19. **Filing.**

This is important as you may need to retrieve documents or answer questions by your superiors immediately, and they cannot be kept waiting. This applies to both physical files in the cabinet as well as files on your computer.

20. **Responsibility.**

Know your level of responsibility with the company and take ownership for your job scope and inventory.

Resource Material

https://wps.prenhall.com/wps/media/objects/4169/4270049/dub91796_ch16.pdf

Annexure-II:

Motivational Lectures
Customer Services and Sales Representative

What is freelancing and how you can make money online - BBCURDU

https://www.youtube.com/watch?v=9jCJN3Ff0kA

What Is the Role of Good Manners in the Workplace? By Qasim Ali Shah | In Urdu

https://www.youtube.com/watch?v=Qi6Xn7yKIlQ

Hisham Sarwar Motivational Story | Pakistani Freelancer

https://www.youtube.com/watch?v=CHm_BH7xAXk

21 Yr Old Pakistani Fiverr Millionaire | 25-35 Lakhs a Month Income | Interview

https://www.youtube.com/watch?v=9WrmYYhr7S0

Success Story of a 23 Year - Old SEO Expert | How This Business Works | Urdu Hindi Punjabi

https://www.youtube.com/watch?v=tIQ0CWgszl0

Failure to Millionaire - How to Make Money Online | Fiverr Superhero Aaliyaan Success Story

https://www.youtube.com/watch?v=d1hocXWSpus

SUGGESTIVE FORMAT AND SEQUENCE ORDER OF MOTIVATIONAL LECTURE.

Mentor

Mentors are provided an observation checklist form to evaluate and share their observational feedback on how students within each team engage and collaborate in a learning environment. The checklist is provided at two different points: Once towards the end of the course. The checklists are an opportunity for mentors to share their unique perspective on group dynamics based on various team activities, gameplay sessions, pitch preparation, and other sessions, giving insights on the nature of communication and teamwork taking place and how both learning outcomes and the student experience can be improved in the future.

Session- 1 (Communication):

Please find below an overview of the activities taking place Session plan that will support your delivery and an overview of this session's activity.

Session- 1 OVERVIEW
Aims and Objectives:
• To introduce the communication skills and how it will work • Get to know mentor and team - build rapport and develop a strong sense of a team • Provide an introduction to communication skills • Team to collaborate on an activity sheet developing their communication, teamwork, and problem-solving • Gain an understanding of participants' own communication skills rating at the start of the program

Activity:	**Participant Time**	**Teacher Time**	**Mentor Time**
Intro Attend and contribute to the scheduled.			
Understand good communication skills and how it works.			
Understand what good communication skills mean			
Understand what skills are important for good communication skills			
Key learning outcomes:	**Resources:**		**Enterprise skills developed:**
• Understand the communication	• Podium • Projector		• Communication • Self Confidence

skills and how it works. • Understand what communication skills mean • Understand what skills are important for communication skills	• Computer • Flip Chart • Marker	• Teamwork

Schedule	Mentor Should do
Welcome: **5 min**	Short welcome and ask the **Mentor** to introduce him/herself. Provide a brief welcome to the qualification for the class. Note for Instructor: Throughout this session, please monitor the session to ensure nothing inappropriate is being happened.
Icebreaker: **10 min**	Start your session by delivering an icebreaker, this will enable you and your team to start to build rapport and create a team presentation for the tasks ahead. The icebreaker below should work well at introductions and encouraging communication, but feel free to use others if you think they are more appropriate. It is important to encourage young people to get to know each other and build strong team links during the first hour; this will help to increase their motivation and communication throughout the sessions.
Introduction & Onboarding: **20mins**	Provide a brief introduction of the qualification to the class and play the "Onboarding Video or Presentation". In your introduction cover the following: 1. Explanation of the program and structure. (Kamyab jawan Program) 2. How you will use your communication skills in your professional life. 3. Key contacts and key information – e.g. role of teacher, mentor, and SEED. Policies and procedures (user agreements and "contact us" section). Everyone to go to the Group Rules tab at the top of their screen, read out the rules, and ask everyone to verbally agree. Ensure that the consequences are clear for using the platform outside of hours. (9am-8pm) 4. What is up next for the next 2 weeks ahead so young people know what to expect (see pages 5-7 for an overview of the challenge). Allow young people to ask any questions about the session topic.
Team Activity Planning: **30 minutes**	MENTOR: Explain to the whole team that you will now be planning how to collaborate for the first and second collaborative Team Activities that will take place outside of the session. There will not be another session until the next session so this step is required because communicating and making decisions outside of a

	session requires a different strategy that must be agreed upon so that everyone knows what they are doing for this activity and how. • "IDENTIFY ENTREPRENEURS" TEAM ACTIVITY • "BRAINSTORMING SOCIAL PROBLEMS" TEAM ACTIVITY" *As a team, collaborate on a creative brainstorm on social problems in your community. Vote on the areas you feel most passionate about as a team, then write down what change you would like to see happen.* Make sure the teams have the opportunity to talk about how they want to work as a team through the activities e.g. when they want to complete the activities, how to communicate, the role of the project manager, etc. Make sure you allocate each young person a specific week that they are the project manager for the weekly activities and make a note of this. Type up notes for their strategy if this is helpful - it can be included underneath the Team Contract.
Session Close: **5 minutes**	**MENTOR:** Close the session with the opportunity for anyone to ask any remaining questions. **Instructor:** Facilitate the wrap-up of the session. A quick reminder of what is coming up next and when the next session will be.

MOTIVATIONAL LECTURES LINKS.

TOPIC	SPEAKER	LINK
How to Face Problems In Life	**Qasim Ali Shah**	**https://www.youtube.com/watch?v=OrQte08MI90**
Just Control Your Emotions	**Qasim Ali Shah**	**https://www.youtube.com/watch?v=JzFs__yJt-w**
How to Communicate Effectively	**Qasim Ali Shah**	**https://www.youtube.com/watch?v=PhHAQEGehKc**
Your ATTITUDE is Everything	**Tony Robbins Les Brown David Goggins Jocko Willink Wayne Dyer Eckart Tolle**	**https://www.youtube.com/watch?v=5fS3rj6eIFg**
Control Your EMOTIONS	**Jim Rohn Les Brown TD Jakes Tony Robbins**	**https://www.youtube.com/watch?v=chn86sH0O5U**
Defeat Fear, Build Confidence	**Shaykh Atif Ahmed**	**https://www.youtube.com/watch?v=s10dzfbozd4**
Wisdom of the Eagle	**Learn Kurooji**	**https://www.youtube.com/watch?v=bEU7V5rJTtw**
The Power of ATTITUDE	**Titan Man**	**https://www.youtube.com/watch?v=r8LJ5X2ejqU**
STOP WASTING TIME	**Arnold Schwarzenegger**	**https://www.youtube.com/watch?v=kzSBrJmXqdg**
Risk of Success	**Denzel Washington**	**https://www.youtube.com/watch?v=tbnzAVRZ9Xc**

Annexure-III

SUCCESS STORY

S. No	Key Information	Detail/Description
1.	**Self & Family background**	**Danyal Saleem,** who lives in Mirpur (AJK), is an example of how hard work and perseverance can reap rich rewards when bidding for projects online. The graphic designer works exclusively on an online freelancing platform and has earned, on average, **US$20,000** per month for the past several months. But this isn't a story of overnight success – Danyal has had to work hard to differentiate himself and stay true to his goal. It was a full year later, in May 2017, when Danyal finally decided to jump in. He signed up for one of the numerous sites that connect designers or coders with people or companies that have small projects, like designing a logo or building a website. He had already started a small business to help pay for his college education, so he was nervous and apprehensive about the decision. "I gave myself two or three months at most. If I didn't succeed, then I would go back to running the business as it was showing potential," he says. **If at first, you don't succeed, try try again**
2.	**How he came on board NAVTTC Training/ or got trained through any other source**	Certification in graphic designing from STEPS(NAVTTC partner institute)
3.	**Post-training activities**	**Danyal's** area of expertise is in **graphic design**. In his first month using Fiverr, he pitched mostly for projects centered around logo designing. But it wasn't so simple. In the first few weeks, he didn't hear back from even a single client, despite pitching for dozens of projects. "I needed to understand what worked, so I read blogs, participated in forums, and analyzed profiles of successful freelancers. It was an uphill struggle, but I didn't want to give up," he explains. Danyal says he understands why clients would be apprehensive giving projects to untested freelancers. They have hundreds of options to choose from, he

		explains, and to give a project to someone with no experience requires a strong leap of faith. A slow stream of projects started to come Danyal's way. Within a few months, he was landing an average of a hundred projects every month, with a large number of repeat clients. He also expanded the range of his professional services, branching out from logo design to business cards, banners, Facebook cover pages, letterheads, and stationery. But he's had to face his fair share of challenges too. The shoddy state of internet infrastructure in his city, Mirpur, threatened to derail his freelancing career. "Sometimes I haven't had connectivity for two days straight," he explains. "That's unthinkable for someone who makes his livelihood on the internet."
4.	**Message to others** **(under training)**	Take the training opportunity seriously Impose self-discipline and ensure regularity Make Hard work pays in the end so be always ready for the same.

<u>Note:</u> Success story is a source of motivation for the trainees and can be presented in several ways/forms in a NAVTTC skill development course as under: -

1. To call a passed out successful trainee of the institute. He will narrate his success story to the trainees in his own words and meet trainees as well.
2. To see and listen to a recorded video/clip (5 to 7 minutes) showing a successful trainee Audio-video recording that has to cover the above-mentioned points.*
3. The teacher displays the picture of a successful trainee (name, trade, institute, organization, job, earning, etc) and narrates his/her story in the teacher's own motivational words.

* *The online success stories of renowned professional can also be obtained from* ***Annex-II***

Annexure-IV:

Workplace/Institute Ethics Guide

Work ethic is a standard of conduct and values for job performance. The modern definition of what constitutes good work ethics often varies. Different businesses have different expectations. Work ethic is a belief that hard work and diligence have a moral benefit and an inherent ability, virtue, or value to strengthen character and individual abilities. It is a set of values-centered on the importance of work and manifested by determination or desire to work hard.

The following ten work ethics are defined as essential for student success:

1. **Attendance:**
   Be at work every day possible, plan your absences don't abuse leave time. Be punctual every day.
2. **Character:**
   Honesty is the single most important factor having a direct bearing on the final success of an individual, corporation, or product. Complete assigned tasks correctly and promptly. Look to improve your skills.
3. **Team Work:**
   The ability to get along with others including those you don't necessarily like. The ability to carry your weight and help others who are struggling. Recognize when to speak up with an idea and when to compromise by blend ideas together.
4. **Appearance:**
   Dress for success set your best foot forward, personal hygiene, good manner, remember that the first impression of who you are can last a lifetime
5. **Attitude:**
   Listen to suggestions and be positive, accept responsibility. If you make a mistake, admit it. Values workplace safety rules and precautions for personal and co-worker safety. Avoids unnecessary risks. Willing to learn new processes, systems, and procedures in light of changing responsibilities.
6. **Productivity:**
   Do the work correctly, quality and timelines are prized. Get along with fellows, cooperation is the key to productivity. Help out whenever asked, do extra without being asked. Take pride in your work, do things the best you know-how. Eagerly focuses energy on accomplishing tasks, also referred to as demonstrating ownership. Takes pride in work.
7. **Organizational Skills:**

Make an effort to improve, learn ways to better yourself. Time management; utilize time and resources to get the most out of both. Take an appropriate approach to social interactions at work. Maintains focus on work responsibilities.

8. **Communication:**

   Written communication, being able to correctly write reports and memos. Verbal communications, being able to communicate one on one or to a group.

9. **Cooperation:**

   Follow institute rules and regulations, learn and follow expectations. Get along with fellows, cooperation is the key to productivity. Able to welcome and adapt to changing work situations and the application of new or different skills.

10. **Respect:**

    Work hard, work to the best of your ability. Carry out orders, do what’s asked the first time. Show respect, accept, and acknowledge an individual’s talents and knowledge. Respects diversity in the workplace, including showing due respect for different perspectives, opinions, and suggestions.