

CHADWICK CONSULTING, INC.

Mailing Address:  
P.O. Box 859  
Lewisville, NC 27023

---

Office: (336) 945-0645  
Fax: (336) 293-7684  
Website: [www.chadwickconsulting.com](http://www.chadwickconsulting.com)  
E-mail: [sidchadwickcc@gmail.com](mailto:sidchadwickcc@gmail.com)

Delivery Address:  
4141 Chatham Hill Dr.  
Winston Salem, NC 27104

**3-DAY “INSIDE SALES REP”/CSR EDUCATION & TRAINING PROGRAM**

(Not to be Reproduced without Permission)

**CURRICULUM:**

This program is designed to provide new --- or experienced --- or senior business development professionals --- with a grounding in “Why Inside Sales Teams can be profoundly successful delivering Business Development and Services” --- in Graphic Communications.

Organizations, large and small --- are “relearning” what big corporations are --- demonstrating --- that “Print is necessary --- even critical --- to successful communications --- branding --- and promotions.”

This 3-Day Program is positioned to make a significant, positive contribution to development of new business --- from an Inside Sales Team perspective. It’s also positioned to support your wanting to improve your organization’s performance --- regardless of what technologies are evolving, or your equipment mix.

To the conscientious attendee, your professional life may never be the same for what you can expect to learn in these three days. Many attendees write us back, saying, “*These were the most profound education days of my life...!*”

This program is focused on professional development --- and introduction to processes --- even some not currently used in your organization. This program provides understanding on: (a) how you should renew, grow, and sustain customers , (b) how to better work as a Team, and (d) how to develop and manage customers --- with an *Inside Sales Team*.

You can expect to experience an intellectual integration of ideas, resources, and ways to approach almost any situation you might expect to face professionally.

Whether you represent an organization with 1,000 employees, or seven, you are about to enter three truly unique days of instruction and discussion that your employer has provided, away from most of your day-to-day responsibilities.

We advise attendees to use every minute to learn, listen, question, reflect, discuss --- and understand --- how one's professional life can be more purposeful, and productive --- for development of your career, and for contributions to your family, your customers, your associates, and your employer.

As an overview, content ranges from a refresher of fundamentals in market conditions, marketing and sales --- plus prospect and customer research activities, to how to create and measure direct mail and direct marketing's effectiveness, to the potential value of digital personalization and social media --- for business development.

We encourage all organizations to seriously consider sending *more than one attendee*, as more than one attendee tends to create "a team effect" for implementing change and innovation, on their return.

### **DAY ONE:**

This day is organized to provide attendees with an introduction and grounding in core issues, including but not limited to:

- (a) Why we are in business (to create and develop customers...!).
- (b) How to create, and "What Perceived Customer Value is".
- (c) "Elements of Price." ...and why "Low Price" does not always win....!
- (d) The value of "Differentiation", what it is, and what it isn't.
- (e) Market and Buyer Trends --- and their implications for successful suppliers.
- (f) Customer Markets that are growing...e.g., short-run publications...!
- (g) Importance of "Services" and "Additional - Useful Information" --- for creating Perceived Customer Value.

- (h) *What* to research (and why!) in preparation for obtaining successful initial and repeat communications with a target customer/prospect.
- (i) An introduction to significant Research Resources --- and how to find and use them.
- (j) Applications and demonstrated “Value of Useful Information” --- to create value -- with target accounts and prospects.
- (k) Use and value of using a Weekly Itinerary, with copies to your CSR and Supervisor.
- (l) *Lifetime* Value of a Customer.
- (m) Introduction to Position Descriptions for an “Inside Sales Rep”.

The *first* of two **Homework Assignments**. (e.g., RefUSA, and PrintInTheMix)

## **DAY TWO:**

Review Homework Assignment. (Also, collect “attendee evaluations” for Day-1.)

Subsequently, for Day Two, there’s a heavy focus on “Preparations before Contact”, and “*Communications*”:

- (a) How different individuals have different communications needs (exercises based on Carl Jung’s personality development theory --- students keep the text that’s used).
- (b) How different communication needs of your buyers should be used in verbal, written and activity-driven communications (e.g., sales calls, plant tours, quote letters, and press-checks).
- (c) The value of social media communications, their applications, and their limitations (e.g. Facebook, LinkedIn, Twitter). Research from PrintInTheMix is assigned.
- (d) “Customer Profile” Information to obtain, why, and how to use.
- (e) Personalized Quote Letters.
- (f) Follow-up of Quotes – to Win More Profitable Work.
- (g) Quote Logs --- for Winning More Profitable Work.
- (h) Importance of building relationships with your Production Management Team.
- (i) Additional new Research Resources are also introduced this day.

- (j) How to obtain a first --- and most importantly --- *follow-up* appointments.
- (k) How to successfully use Samples to create comfort, and perceived customer value.
- (l) Standards of Communications for emails, voicemail, fax, letters, and personal.
- (m) Value of Social Media, and how to use it --- as well as how “Facebook Fatigue” is a real phenomena --- that’s growing, and changing.
- (n) What to prepare --- before every contact.
- (o) How to develop better questions --- that lead to more effective and productive Sales Calls, and new business.
- (p) What is required to develop an Inside Sales Team, and why this can be critical to your company’s future.

Note: Attendees are encouraged to bring contact information of “Neglected Customers” -- where business has noticeably dropped-off --- for live classroom demonstrations on “Renewing Neglected Customers” calls.

**Homework Assignment** that utilizes parts of what was introduced and learned this day. (Also, evaluations for Day Two.)

**DAY THREE:**

(Expect this day to begin about 7:30 am).

Review Homework Assignment. This day works to integrate much of what’s been learned, and introduced --- through the first two days.

Day three focuses on activities and understandings of the importance of developing *long term working relationships* --- with customers, associates, and suppliers. This includes developing “long-term agreements” with customers --- who have historically been “transactional”.

**We Introduce:**

- (a) Why it’s important how we “Handle Bad News” with customers.
- (b) What good listeners do.

- (c) How, when, and why --- to use “Notes of Appreciation.”
- (d) Pricing Strategies.
- (e) Major Proposal elements, and when to use them.
- (f) How to conduct a Customer Press-check (and post press-check Surveys).
- (g) Sample Customer Press-Check Document --- for educating Customers on Press-Checks.
- (h) How to conduct a Plant Tour (and post tour Survey).
- (i) How to use suppliers to win work.
- (j) How to effectively use the USPS “Every Door Direct Mail” to win work.
- (k) Cross-media Case Studies are presented --- including measuring results.
- (l) How and why “Web-to-Print” is part of our industry’s future, and what successful Programs look like.
- (m) Importance of intellectual, strategic-type services for creating long-term working relationships, and revenues!
- (n) Spin Selling --- the rare art of “closing a deal” --- that was “going the other way.”
- (o) How “Statements of Work” can more easily lead to a Long-term Agreement.
- (p) The difference and importance of Long-Term Agreements --- that buyers increasingly prefer.
- (q) Developing Your Written Business Development Plan --- What it looks like.
- (r) A review of ongoing industry (e.g., PrintInTheMix) and Chadwick Consulting research resources --- that are available, and generally speaking --- free!
- (s) Each participant is required to create a “written business development plan” --- and set of priorities --- for their next 30-60-90 days --- that are discussed as a group --- with the participant taking a copy with them. We are responsible for calling and discussing each participant’s plan --- at 30, 60, and 90 days!
- (t) What today’s millennials are looking for, their values, what to avoid, as well as what to emphasize in serving and gaining their attention.
- (u) Why education and training of “The Team” is critical for your future performance, and “What to consider including.”

**Attendees’ Evaluations for Overall Program.**