

THE TELEPHONE SHOPPING REPORT: HOW TO **EFFECTIVELY** CONDUCT FOLLOW-UP TRAINING

You just notified an employee of their recent unacceptable telephone shopping report. What happens next? Interestingly enough, the steps you take to prepare as the trainer are just as important as the steps the employee will take towards improvement. How well you overcome potential training barriers such as fear, frustration, blame, ego and even time constraints will determine the overall success of your training session.

There are four important factors that come into play when your intention is to conduct effective follow-up training:



1 Make Training Timely and Convenient

- a. Timing is of the essence. The sooner you schedule training with the employee the better. Although you want them to take time and review their report, you do not want them to brew over it. Ideally, it should be conducted within the same week they receive their report. Schedule a training time and stick to it!
- b. Training over the phone. Facilitating training over the telephone can save you and the employee time and money. The only tools you need are a working telephone line and a computer with an Internet connection and sound capability.
- c. Training session length. This will depend on the employee's shopping history, experience, temperament and the details of their most recent shopping report. Ideally, it should take 20-40 minutes from start to finish.



2 Be Prepared

- a. Breakdown the report into sections. Every telephone shopping report can be broken down into four sections; greeting, qualifying, selling and closing. Prepare your training outline based on strengths and weaknesses in each of these sections. Review at least one additional shopping report to use as a comparison to the current report. Pay close attention to the comments and look for strong and weak patterns from shop to shop. By identifying patterns you will give your training plan credibility and show the employee that you have done your homework.
- b. Review recorded calls. Listen to the employee's recorded unacceptable shop call (if applicable) **and** at least two random additional recorded calls. This will provide you with a broader view of the employee's strengths and weaknesses vs. just a snapshot of a written report. Insert your notes into your training outline. Save the recorded calls on your desktop to replay during your training session.
- c. Reference the report. Both you and the trainee should have the current shopping report available for discussion during the training.



3 Be Open and Honest. It is Training Time!

- a. Discuss what happened. There are always two sides to the story. Discuss both sides and diffuse any "shopper conspiracy theories". Focus on them learning from the past but not living in it! Show empathy and be encouraging.
- b. Play the recorded calls over the telephone. The proof is in the pudding! By playing the current report call (if applicable) along with another call you are able to provide a comparison and point out consistencies and inconsistencies in their presentation. Hearing is believing!
- c. Ask them to evaluate themselves. Once they have listened to the recordings ask them to provide you with feedback. Now it's your turn to be open and honest. Discuss the key strengths and weaknesses you wrote down on your training outline. Move from section to section asking for feedback along the way.
- d. Get them to take ownership. Ask them what they could have done differently. Provide them with training tips that will help them improve their presentation.



4 Discuss and Agree on Steps Towards Improvement

- a. Personal Accountability! If you fail to plan, you plan to fail. Help prepare them for their next telephone presentation.
 - i. Encourage them to listen to additional recorded telephone shops while evaluating themselves.
 - ii. Encourage them to role-play with another person.
 - iii. Create a "perfect shop" script for them to role-play on their own or with another person.

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**"Failing to plan is planning to fail."
~Chinese Proverb**

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