

# LEADERSHIP MANUAL

Training guide

# ***Leadership Development Manual for Team Leaders***

***“How you do anything is how you do everything”***

## **Welcome to Your Path to Leadership!**

At The Men with Tools, we recognize that the foundation of our success lies in the strength of our sales team and the leaders who guide them. This Leadership Development Manual is designed to nurture and refine your leadership abilities, ensuring you are equipped to lead our sales team towards achieving exceptional results. As you embark on this journey, you will learn not only how to meet your sales targets more effectively but also how to inspire, motivate, and elevate your team members to their fullest potential.

## **Our Objective**

The primary objective of this manual is to create a structured path for developing high-performing team leaders who can significantly contribute to our mission of delivering outstanding service and quality in the window and door industry. Through this program, you will gain insights into the core aspects of sales leadership, including strategic planning, team management, conflict resolution, and performance optimization.

## **What You Will Learn**

1. **Leadership Fundamentals:** Understand what makes a successful leader at [Your Company Name]. Explore leadership styles, the importance of emotional intelligence, and how to effectively communicate and inspire your team.
2. **Sales Mastery:** Dive deep into advanced sales techniques and strategies tailored specifically to the window and door market. Learn how to leverage customer insights and market trends to exceed sales targets.
3. **Team Dynamics and Management:** Develop your skills in managing diverse teams, fostering a collaborative environment, and driving your team towards common goals. Learn how to identify and utilize the strengths of individual team members to boost overall team performance.
4. **Problem Solving and Decision Making:** Enhance your ability to tackle challenges head-on, make informed decisions quickly, and solve problems efficiently to keep your team on track.
5. **Performance Measurement:** Understand the metrics that matter. Learn how to set achievable yet ambitious goals for your team, measure performance effectively, and provide constructive feedback to encourage growth.
6. **Personal Development:** Cultivate a mindset geared towards continuous improvement, both for yourself and your team. Set personal leadership goals and learn how to achieve them through self-assessment and reflection.

## **How to Use This Manual**

This manual should be used as both a learning tool and a reference guide throughout your leadership journey. Each section includes practical advice, exercises, and actionable steps to implement the concepts discussed. Engage with the material, participate in all suggested activities, and apply the lessons learned to real-world scenarios within your team.

By the end of this program, you will not only be ready to lead effectively but also drive your team towards sustained success and growth. Remember, the journey to becoming a great leader is ongoing, and every challenge is an opportunity to learn and improve.

# The Men with Tools Sales Culture: Excellence as Our Goal

At The Men with Tools, our pursuit of excellence is relentless. Excellence signifies being outstanding and superior in all our endeavors. We embody this in every aspect of our operations—from meticulously handling appointments to attentively managing the smallest details. As a SWAT Team member, you represent the top 2% of talent globally. Our commitment doesn't waver until decisions are made, and we carry one another forward without exception.

Certainly! Here's a refined and more polished version of the text for the sales manual, aiming to clearly communicate the values and expectations within The Men with Tools sales culture:

## Core Principles of a SWAT Team Member

1. **Extreme Ownership:** Every SWAT Team member is disciplined, dominant, strong-willed, and consistent. We take extreme ownership of our results, holding ourselves accountable without resorting to excuses.
2. **Being the Example:** Act as if you are already the best version of yourself. This mindset propels you and those around you towards continuous improvement and operational excellence.
3. **Student Mentality:** Always be learning. Dedication to your craft involves a constant pursuit of knowledge and skill enhancement, ensuring you stay ahead in a competitive landscape.
4. **Office Presence:** Be the uplifter. Your presence should inspire and energize your peers. Lead by example, demonstrating positivity and resilience in every interaction.
5. **Consistency:** This is the point where mindset, discipline, and skillset converge. A consistent performance adheres to our core methodologies and systems, ensuring reliability and peak performance.

## The Power of Consistency

Consistency is the foundation upon which excellence is built. It ensures that every effort aligns with our highest standards and strategic goals. By maintaining a consistent approach, SWAT Team members create a reliable and predictable environment conducive to achieving outstanding results.

# Sales Mastery

## Law of Averages (LOA's)

- Every “No” brings you closer to your “Yes”!
- Have a personal S.O.U. - Make sure you take quick steps in the field and you eat a quick lunch.
- **QTQP** - Quality time with Quality People
- **80/20 Rule:** You want to spend 80% of your time with 20% of the people who matter.
- **QQ-** Qualify quickly - Find out if the person you are speaking to can make a decision; if not then find out when they will be there and get out of the business (disengage).

### Attitude - 100%:

Assign each letter to the corresponding number

A=1

T=20

T=20

I =9

T=20

U=21

D=4

E=5

Add up all of the numbers and it equals **100!**

**Example:** If you go to a coke machine and want to get a drink for a dollar, and you only put in 99 cents, are you going to get your drink?

### Mentality:

- Be confident
- Don't take “No's” personally
- Have an expert mentality
- Don't lose focus
- Keep work life at work and home life at home
- Don't let outside problems affect your work attitude
- Your negative attitude affects others; Don't have one!

- **Having a great mentality brings you closer to your GOALS!**

#### **4's, 5's and 8's**

**“Success is not the result of spontaneous combustion. You must set yourself on fire.”**

**-Reggie Leach**

#### **4 Factors of Impulse**

##### **Jones Effect**

Definition: Everyone wants what everyone else has.

Example: “Your neighbor John just got it!”

##### **2. Indifference**

Definition: One customer doesn't make or break a day accounting to the law of averages.

Example: “I have a ton of customers to visit, I am just here to help you if I can.”

##### **3. Fear of Loss**

Definition: The feeling that if you don't get something right now, something you want may not be available later.

Example: “If you don't sign up with me now, I cannot guarantee these rates will be available later.”

##### **4. Sense of Urgency**

Definition: As a representative, you have places to go and customers to help out. Show customers that you too are very busy. Show them your sense of urgency through your actions by moving quickly and keeping your pitch short and simple.

Example: “I understand you are busy, I will be very fast for you.”

## **10 Steps of a Conversation**

1. **SET EXPECTATIONS:** Engage the customer! When you start your conversation you should always use **SEE** factors (**S**mile, **E**ye Contact, **E**nthusiasm), and project your voice towards the customer.

*You: “Hi (Customer Name), Im (Your name) from The Men with Tools. It looks like I'll be meeting with (Customer Names), is everyone here today? Awesome and we will be looking at (x windows/doors) today correct?”*

*You: “Perfect and did the office go over what I'll be covering today? Just so we're*

*on the same page. I'll just quickly go over what I'll be covering today, sound fair enough?*

*You: "Firstly, I'm going to look at and measure your project so that I can help you determine what you need."*

*You: "Second, I'm going to sit down and ask you guys some questions so that I can determine what you're both looking for."*

*You: "Third, I'm going to show you a few things about our windows and tell you a little bit about our company."*

*You: "And lastly, I'm going to give you an EXACT price that's good for one full year. On average, this takes me about 60 – 90 minutes depending on how many questions you have. Fair enough?"*

*You: "Excellent! Let's get started."*

2. **MEASURE & INSPECT:** This is an important part of the sale, as it allows you to build credibility as an expert and build urgency around the project as to why they can't wait any longer or put off this project!
3. **NEEDS ASSESSMENT:** This is an important part of the conversation, as it allows you to find the customers hot spots and reduce the baggage you take with you to the close. The needs assessment is all about QUESTIONING and LISTENING!

**Window Needs Assessment:** <https://youtu.be/G2pbIS6cCWk>

**Door Needs Assessment:** <https://youtu.be/KsSfluMZcy0>

4. **INGAGE PRESENTATION:** Where we show the prospect a little about us, review the product options, perform our Heat Lamp or Door Bag Demo, our installation process, window & door warranties, & marketplace & industry problem & solution sections. (The Key here is to not talk at the customer but make sure they are ENGAGED throughout the process)
5. **PRODUCT DESIGN:** Review product design options with customer
6. **PRICE PRESENTATION:** <https://youtu.be/YWtbSmdDKnk>

7. **TAKEAWAY SHEET:** <https://youtu.be/UrEdAMepxgM>
8. **ADDITIONAL DISCOUNTS:** <https://youtu.be/e38cYlgj4Xo> & <https://youtu.be/F5eLsMDzXsQ>
9. **DROP PRODUCTS (24 GAUGE DOOR OR DURALAST WINDOW):** If price doesn't make sense review the drop products available to save the customer costs on material.
10. **SOLIDIFY YOUR SALE:** Book a 2nd measure with the customer in home, finalize deposit details & make sure the customer is fully aware and feels confident in next steps!

## 8 Great Work Habits

**Have and Maintain a Great Work Attitude**

**Be On Time**

**Be Prepared**

**Work a Full Day**

**Work you Territory Correctly**

**Respect Your Customer and the Client**

**Understand Your Opportunity**

**Take Control**



## **Daily Sales Manager Checklist: ((Work 1 Sunday a Month Mandatory - Call Richard (Brandon & Jim Back Up))**

1. Check & Create Previous Days Reports(Yesterday's Numbers / Current Week)  
<https://docs.google.com/spreadsheets/d/10lxCefEZfUefGlcjFvxwM2hTfXtvDwhOzalAWKSEDR4/edit#gid=0>
2. Did they upload needs assessment
3. Did they Create The Project In Builder Prime
4. Did they result the appointment in Group Me
5. Did they Upload Needs Assessment
6. Did they Discount Properly on Proposals if Not Why
7. Were there No Demos if so listen to Rilla - speak to rep - find out why (Loop in GM when not a sales issue)

### **How to Assign Leads:**

Look & Create 60-90 Day Reports (Assign Leads Based off this Report)

#1 Look at Close Rate by Lead Source

#2 Look at Close Rate by Product Type

#3 New Customer Close Rate vs Repeat Referrals

New Customer Close Rate vs Repeat Referrals

Look at Monthly Numbers

Look at Past 2 Weeks Numbers

### **How Manager By The Numbers:**

Look & Create 60-90 Day Reports (Assign Leads Based off this Report)

#1 Look at Close Rate by Lead Source

#2 Look at Close Rate by Product Type

#3 New Customer Close Rate vs Repeat Referrals

Look at Monthly Numbers

Look at Past 2 Weeks Numbers

Look at Current Weeks Numbers

Look at State Close Rate by Rep

Look at Close Rate by Rep for appointment Type

### **When Someone Is Struggling (Focus on the Week):**

Listen to Rilla / Identify What they Are Doing Wrong

If 0/6 Ride along OR shadow is necessary

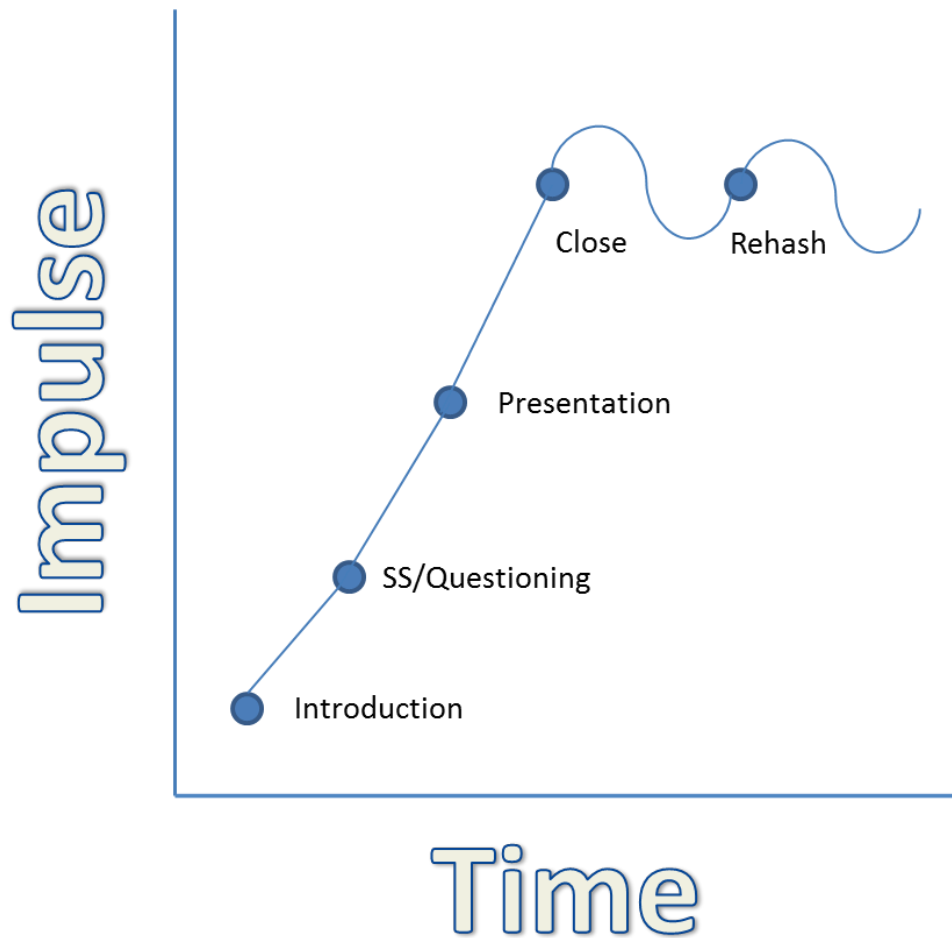
If 0/10 Triggers a PIP

If Under 30% Close Rate Trigger PIP

**PIP Rules: (PIP Is either a 1 Week Reset if multiple steps within sales process are wrong with a Slow 1-3 Week Lead Roll Out OR a 1-4 Week 1 lead a day retrain)**

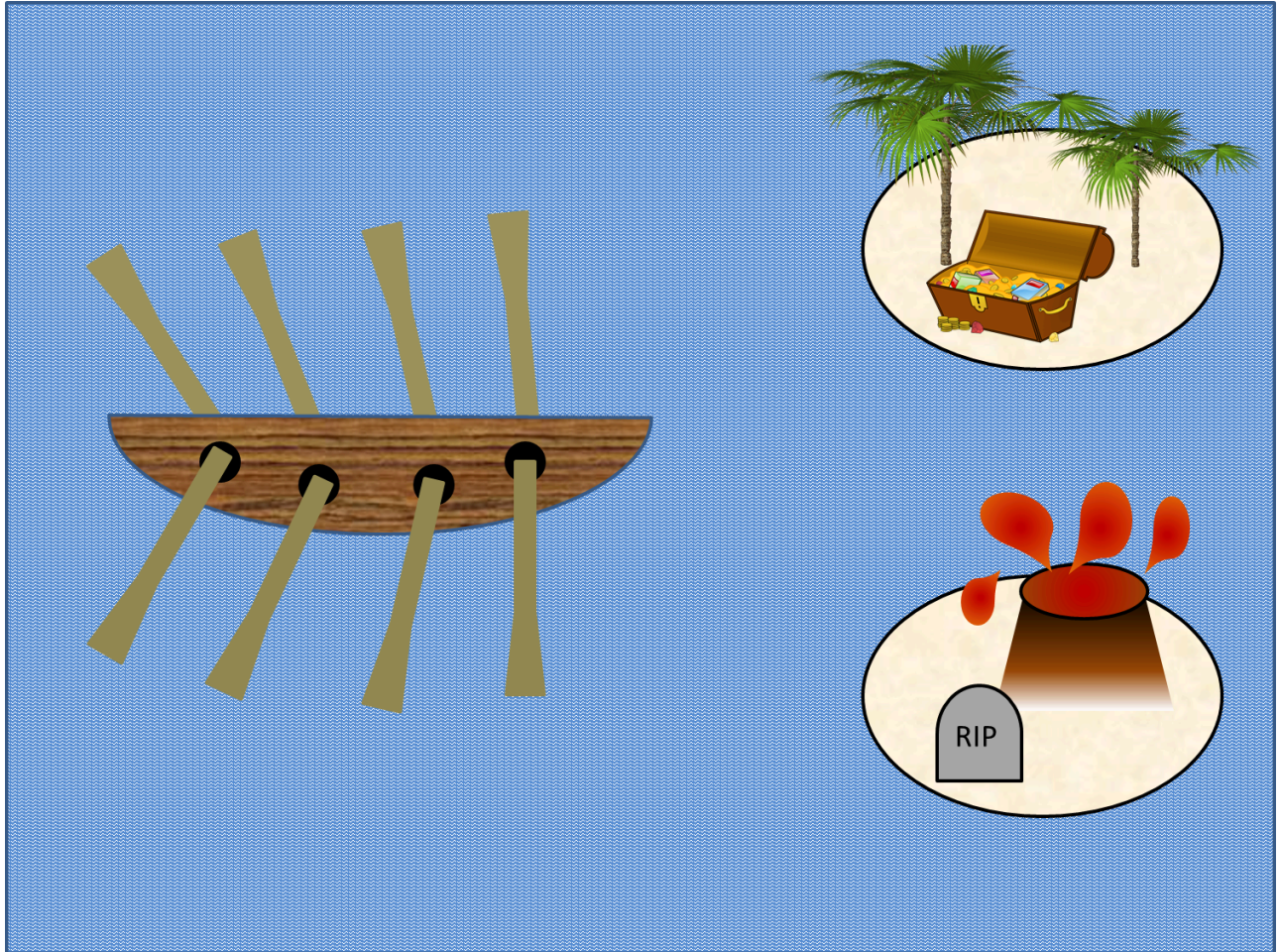
1. Schedule meeting with a rep
  - What Do you think you are doing wrong?
  - How and what are you going to do to fix it?
  - What can I expect from you?
2. Set Cap on Leads (1-4 Weeks 1 Lead Per Day Max)
  - Manager is to listen to all Rillas
  - Manager is to review Feedback with Rep Same Day/Next Day
3. PIP people are in office 8:30 AM 12PM Mon / Wed / Fri
4. TBD by manager Rep is to Shadow 1 lead with manager & manager is to shadow 1 lead
5. Rep is to email / provide 2 rillas they want feedback on and why and must listen to 2 rillas from top performers closes that week and point out what they did that they would like to incorporate into their process

## Impulse Curve



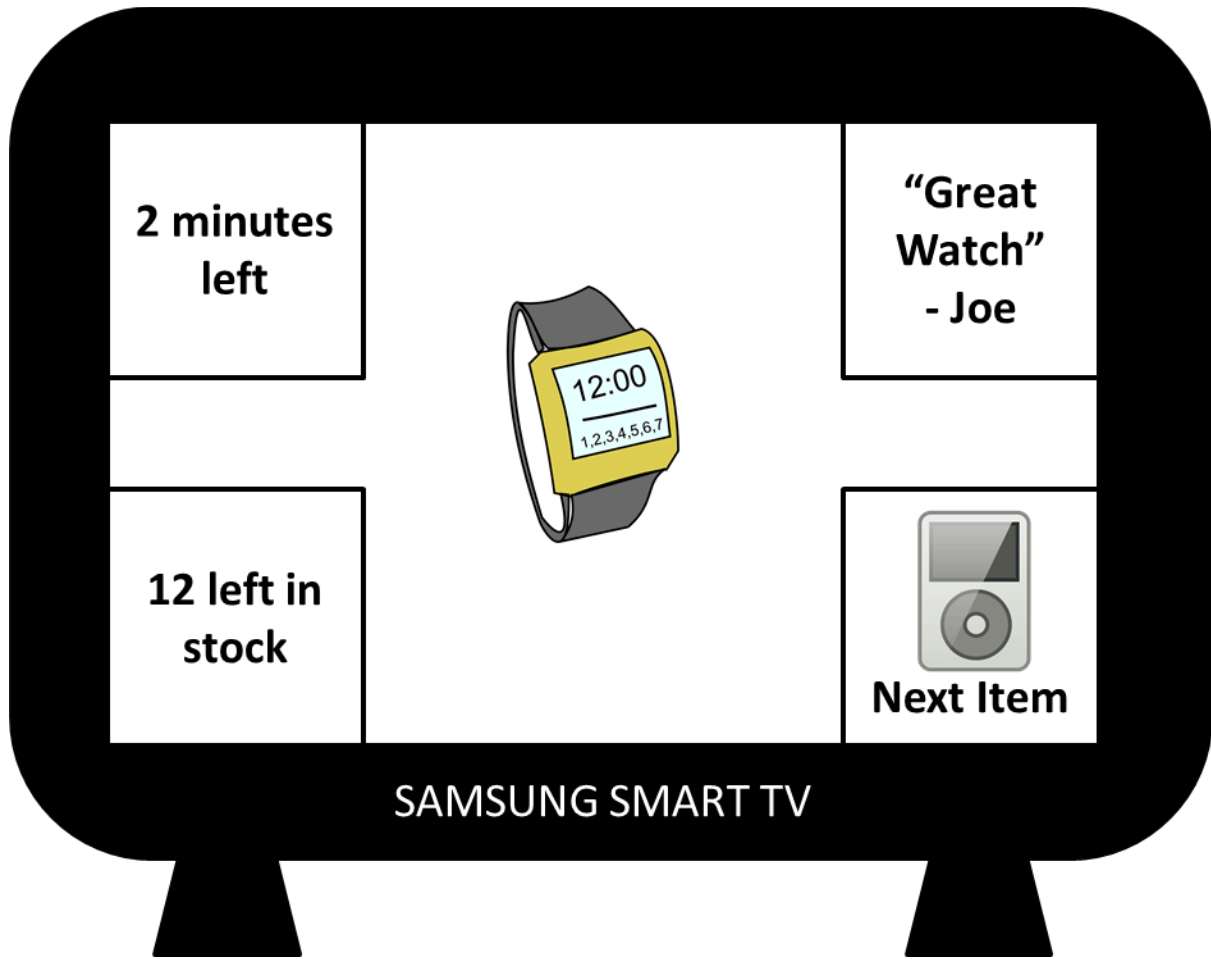
In our business we sell on ***impulse***. We need to close customers at the height of ***impulse***; above is a curve that shows the ***impulse*** trend. ***Impulse*** is relatively low during the introduction. As interest is piqued during questioning, ***impulse*** rises and peaks during the presentation; when there will be a buying sign. Close when you see the buying sign. After the close, ***impulse*** goes down, so impulse again and close on another item (FMA, Promotions, What's Next, etc.) in the rehash.

## Rowboat Theory



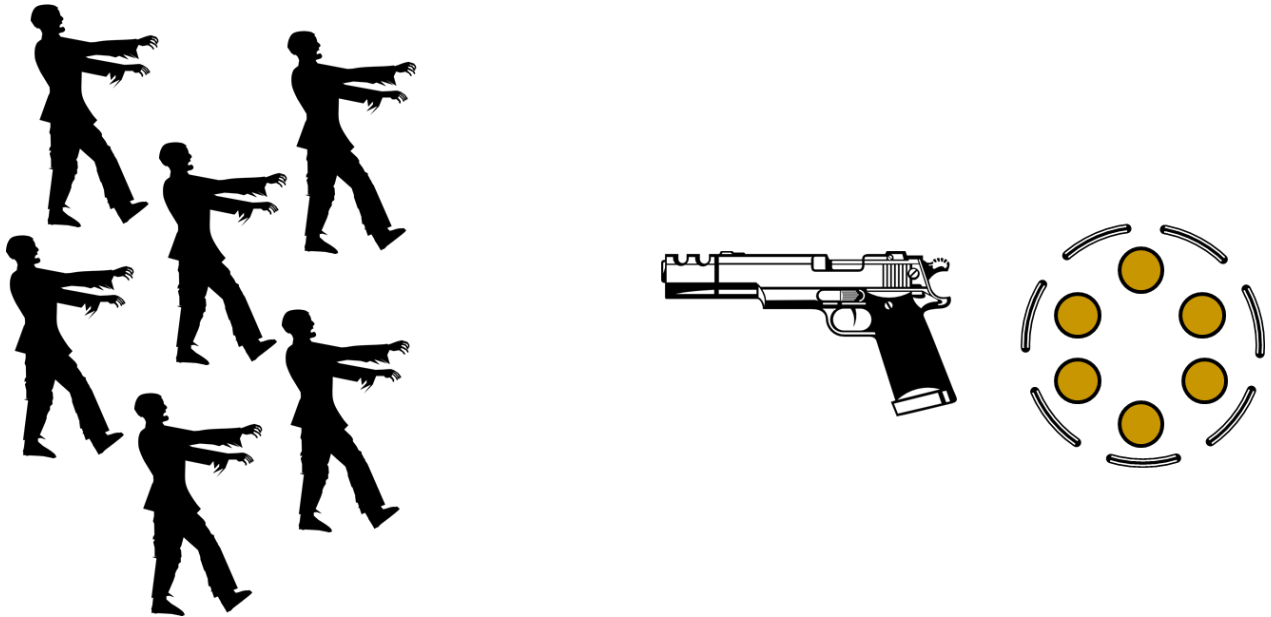
Each of the Eight Great Work Habits is like an oar on a rowboat. You must work each one equally in a strict system in order to stay on course. If one oar is weak, the boat will veer off course and you will not get to where you want to be. So, work all the habits equally to stay on course to hit your goals (even applies in the field towards sales) quickly.

## QVC Theory



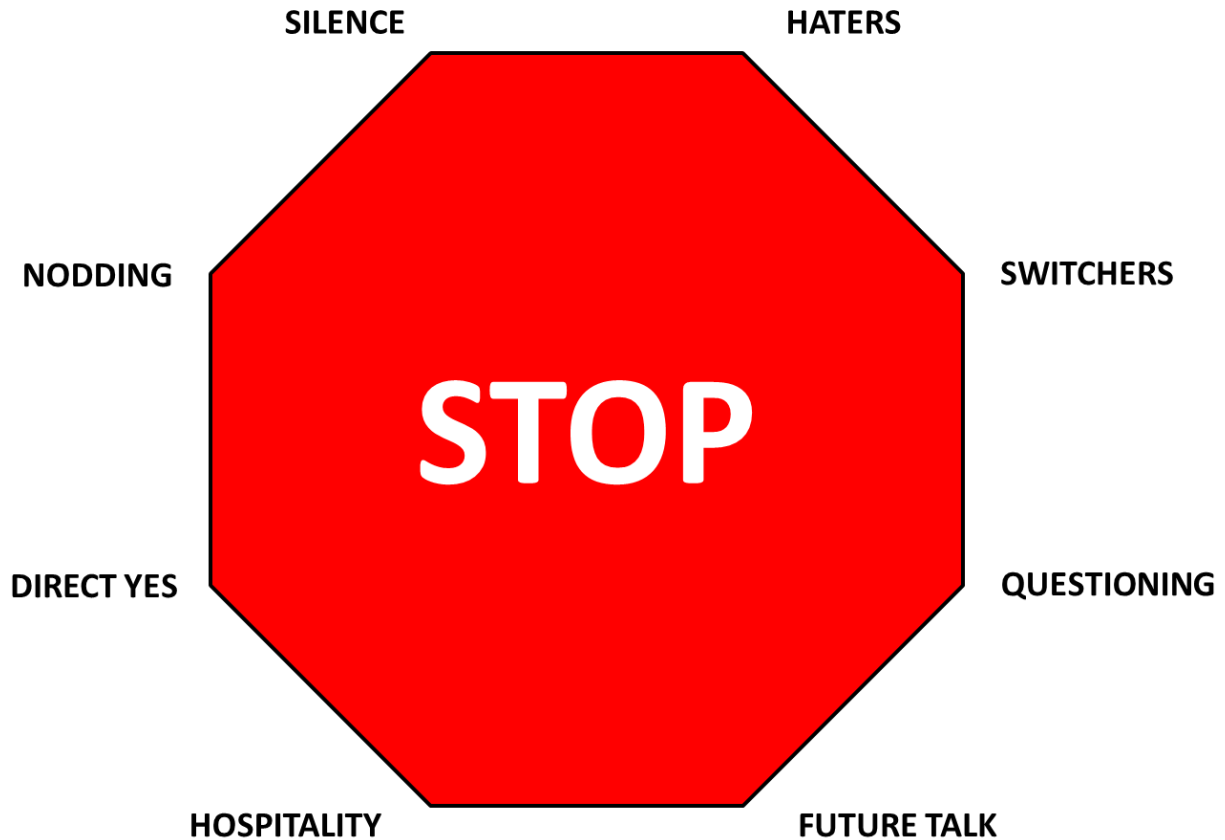
The home shopping network sells millions of products every year in large part because they use the 4 *Factors of Impulse* effectively. The primary focus is on the product being sold; then there are 4 other sections. The upper right box showing the number of items remaining draws on customers' ***Fear of Loss*** because they can see exactly how many items are left. The upper left box draws on customers' ***Sense of Urgency*** because they can see exactly how much more time the sale is good for. The lower left box represents ***Jones Effect***, you have someone who has used the product telling potential buyers how awesome it is. Finally, the lower right box represents ***Indifference***; it shows the next item to be sold indicating that it doesn't matter if you buy the football because the baseball is up next and people will buy that too.

## Bullet Theory



After the closing statement, some customers may have objections. If you already told the customer about all of the promotions you can offer then you have nothing left to overturn their objection with. If a group of zombies were coming at you, would you shoot all of your bullets at once and hope that they all hit and kill the zombies? It would be more effective to wait until each zombie was within range and presented a direct threat before shooting it. Saving your bullets will help you overturn objections that customers may have.

## Stop Sign Theory



When customers are ready to buy they will show a closing sign. This is a sign that you should recognize and respond by saying the closing statement. HATERS have a problem with a past contractor. SWITCHERS are always looking for a good deal. QUESTIONING is asking direct questions about the product or service that matter to them. FUTURE TALK is a question about what happens after they agree to sign up with you. HOSPITALITY is when a customer shares something with you or they invite you to meet their family. DIRECT YES is when a customer comes straight to you ready to buy. NODDING is when the customer is using body language to agree with what you are presenting. SILENCE is when the customer is thinking about their decision. Don't break their silence.

## How to Be Successful and Coach Others

### 1. Drive your law of averages:

Give yourself as many chances as possible to win every day.

Focus on the system and let the numbers work for you don't put the pressure on yourself.

### 2. Keep your pitch simple:

If you confuse your customer, he or she will quickly lose interest. Make the pitch simple and easy. New guys will watch and emulate when they go out into the field. Staying consistent with your approach and delivery is key to your success. Your pitch should be designed to make money but also to enable the law of averages to work. It's not how much you can sell but how much you can teach people quickly. If your pitch becomes sophisticated, it may be effective, but harder for the new guy to learn quickly.

### 3. Maintain attitude and enthusiasm:

Have fun and make money. Increase your face value with a smile. If you see someone who doesn't give a smile, give them one of yours. Never forget the look on your face sets the tone. There is no easier way to build rapport than the smile. When in the field, demonstrate a level of enthusiasm that triggers a mood increase in the customer. Attitude is the first determining factor to whether or not a person is interested in hearing what you have to say. If you are warm and respectful, most likely, they will reflect some of that back. Some people may not reflect it visually, but will still be feeling it inside. When that happens, you've won half the battle already. Kill 'em with kindness and always use integrity.



# Theories and Vocabulary

“That is what learning is. You suddenly understand something you’ve understood all your life, but in a new way. – Doris Lessing

## Theories

- **Holster Theory:** Keep your new guy near you at all times so you can make sure that they are learning and developing from the correct influences in the office. Take them and introduce them to the people that are the best examples in the business. Start to create their associations with the right people.
- **Build, Break, Build:** A method of training, never teach someone by destroying or breaking their confidence. Instead start by building them up, then point out what they need to work on, and then follow up with positive reinforcement to their confidence again. Praise your new guy like crazy; you should make them feel great about themselves because as you do they will gain confidence. Ex: Your SEE factors were great; just make sure you slow your presentation down so customers will understand what you’re saying. By the way, your timing in saying the closing statement was awesome.
- **Feel, Felt, Found:** A method used to empathize over sympathize. You can either use it in training or in the field to overturn objections.
- **KISS:** Keep it short and simple. You don’t like it in school when your teacher goes on and on, and neither does anyone else. Condense large bodies of information to main points that your new guy or customer needs to know.
- **SEE FACTORS:** Smile, eye contact, enthusiasm. This is what separates you from a telemarketer or mailer and gives you the ability to have a relationship with a person. You are meeting people face to face and you want your first impression to be good. Smiling makes people want to talk to you. Your eye contact conveys honesty and will make people believe you. Enthusiasm will get your customer or new guy to be excited about whatever you are talking about. If you are not excited, neither are they.
- **The 3 R’s:** Read, relax, relate. Always read your buyers hotspots. Relax because any nervous activity will make them skeptical. Relate to the person and their surroundings.

## Vocabulary

- **DM:** Decision makers. They are the person you look for to pitch.
- **Closing Signals:** A sign that your customer or interview is ready for the close.
- **Transition to close:** This is a statement used to smoothly get the customer to sign up and let them know they are signing up without saying “So do you want to do it?”
- **Big Picture:** Your vision of the future or concrete evidence of someone else’s success.
- **Accountability Partner:** The person that holds you accountable for setting and reaching goals, as well as maintaining standards. This person should be someone that is tough on you and will push you to get better every day. Everyone should have one.
- **Rehash:** Closing first on one item to seal the deal and then keep adding order size to increase your money.
- **Bullets:** Benefits of whatever you are offering. A very important thing is to only give one bullet at a time and then attempt to close after every one.

## Leadership Musts

- I. You have to be able to teach people to make money. You have to be able to teach people to teach other people to make money.
- II. You have to teach people to be a top leader.
- III. You have to be able to teach people to succeed.
- IV. You have to be an example.
- V. You have to be smart with your money.
- VI. You have to make sure your crew can train people before their trainee arrives.
- VII. You have to be the fearless leader. Nothing can phase you. You have the best attitude.
- VIII. You have to be friendly. Smile. Enjoy what you do.
- IX. You have to know what you want and where you are going.
- X. You have to genuinely care about the success of others.

## What Makes a Top Leader

### Passive Leader:

- Short term minded
- Money and field are most important
- Here because they make money
- Training gets in the way
- Easy to get complacent
- They are competitive in the field – always want to beat other people and beat themselves

### Active Leader:

- Ton of energy, running around, but never getting things done
- Need to focus energy
- Charismatic, and popular with the guys
- They need to use the system and stream line and channel energy

### Top Leader

- Always plays to win
- Cannot be afraid to lose – knows that making choices and messing up is a learning tool
- Always self-motivated
- Motivates the manager – the manager doesn't motivate him
- Always able to take feedback
- Always asking questions and out learning people
- Never asks the same question twice
- No maintenance. Takes ownership
- Sets high standards and not afraid to hit their goals

## Break Even Point

### Fixed

1. Rent \_\_\_\_\_
2. Car Payment \_\_\_\_\_
3. Utilities \_\_\_\_\_
4. Car Insurance \_\_\_\_\_
5. Cell Phone Bill \_\_\_\_\_
6. Credit Card \_\_\_\_\_
7. Student Loans \_\_\_\_\_

Total \_\_\_\_\_

### Variable

1. Food \_\_\_\_\_
2. Gas \_\_\_\_\_
3. Entertainment \_\_\_\_\_
4. Shopping \_\_\_\_\_
5. Clothes \_\_\_\_\_
6. Movies \_\_\_\_\_

Total \_\_\_\_\_

Both totals divided by 26 working days in a month \_\_\_\_\_ is what you need to earn per day to pay your bills.

Divide both totals by 4 weeks in a month so you know what you need to bring home on your paycheck every week to pay your bills and eat \_\_\_\_\_

### 3 Phases of Learning

- I. The “I Got It” Phase – This is poor performance and making no physical changes.
  - a. Stubborn
  - b. Arrogant
  - c. Don’t listen
  - d. No student mentality
    - i. If you don’t listen to the teacher you won’t pass the class.
- II. Asks Questions, But Doesn’t Apply It Stage – This is average performance. Person is stagnant with no growth.
  - a. Only will do it if it fits into their comfort zone
  - b. They get frustrated easy
  - c. Poor student mentality
- III. Asks Questions, And Then Applies It Stage – Next person who is going to get promoted to assistant management.
  - a. Seeks out information
  - b. Proactive
  - c. Highly motivated
  - d. Great student mentality

## 15 Things We Look For In a Top Leader

- DFW
  - a. Are you down for whatever
- Being around
  - a. Do you show up to crew night, team night and hangout on weekends?
- Show up to the office early
  - a. Are you on time, prepared and ready to go? If you are not early then you are late.
- Positive office presence
  - a. Do you have a positive attitude, help the new guys, and are you fun and high energy?
- Set the pace
  - a. Do you high roll the office in sales and profit every week?
- Personable outside the office
  - a. Do you have relationships outside the office? Best relationships should be with your owner.
- The Here Mentality
  - a. Are you 100% present where you are at all times?
- Accountable
  - a. Do you follow through on what you say you are going to do?  
Can your owner count on you to get the job done?
- Seeks coaching
  - a. Do you talk to your owner on a regular basis to see how you can improve and help the office.
- Image
  - a. Do you look like an owner/consultant? Dress for the job you want, not the one you have.
- Great Recruiter

- a. Do you start the interviews you take out? Can you recruit a 9 or 10?
- Responsible with money
  - a. Do you budget and spend money wisely?
- Good energy
  - a. Do people like being around you? Do you add more than you take?
- Ability to promote leaders
  - a. Can you get the new guys through training and into leadership?
- Can you transfer your knowledge and do people want to follow you?

# What is Leadership?

Leadership is the willingness to put oneself at risk.

Leadership is the passion to make a difference with others.

Leadership is being dissatisfied with the current reality.

Leadership is taking responsibility while others are making excuses.

Leadership is seeing the possibilities in a situation while others are seeing the limitations.

Leadership is the readiness to stand out in a crowd.

Leadership is an open mind and an open heart.

Leadership is the ability to submerge your ego for the sake of what is best.

Leadership is evoking in others the capacity to dream.

Leadership is inspiring others with a vision of what they can contribute.

Leadership is the power of ones harnessing the power of many.

Leadership is your heart speaking to the hearts of others.

Leadership is the integration of heart, head and soul.

Leadership is the capacity to care, and in caring, to liberate the ideas, energy and capacities of others.

Leadership is the dream made reality.

Leadership is above all, courageous.



## Definition of Why You Are a Leader

Webster's defines the act of leading as "to show by setting an example." You are considered a leader in our business because you have shown the type of work habits that we can use as an example. Some of these qualities include:

- Positive Attitude
- Enthusiasm/Energy
- High Standards
- Consistency
- Responsibility
- Desire to Achieve
- Professionalism
- Work Ethic
- Solution Oriented

Your challenge is to develop a team who can exhibit these qualities. You will accomplish this by learning how to Train, Build Relationships, and Motivate.

## 20 Things a Leader Needs to Know

- \_\_\_ Interview Do's and Don'ts
- \_\_\_ 2<sup>nd</sup> round interview
- \_\_\_ How to properly use a training packet
- \_\_\_ How to break down someone's day by the numbers
- \_\_\_ Theories
- \_\_\_ Effective high roller speeches
- \_\_\_ Effective meetings
- \_\_\_ How to run a business trip
- \_\_\_ How to effectively run the lobby
- \_\_\_ 5 critical conversations
- \_\_\_ Your personal breakeven
- \_\_\_ To do an effective walk through (explain payroll)
- \_\_\_ Requirements for sales manager
- \_\_\_ How to set team and personal goals
- \_\_\_ How to effectively use a planner (big rocks/little rocks)
- \_\_\_ How to do LOAs
- \_\_\_ How to do the production log/10-day

What we need to teach:

### 1. Fun

- Be the example-be funny
- Crack jokes with customers and with them
- Tell stories in evening atmosphere of what happened in the field and get them to participate (stories they can learn from vs. focusing on the negatives)
- Build/promote their situations
- Don't use the same cliché ice breakers-change the pace a little
- Promote how quickly the day has flown
- Use B-B-B to help them feel better progress
- Get to know them personally everybody loves talking about themselves
  - i.e. where they grew up, brothers, sisters, parents-what do they do

### 2. Be yourself

- ✓ Break these habits
  - Stiffness in body language
  - Pen clicking
  - Gum chewing
  - Looking down-poor eye contact
  - Customer service voice

### 3. Mentality-Student/Competitive

- Lead by example
- Explain your goal behind EVERYTHING that you do and where you hope it leads you
  - i.e. My goal is 50% close rate this week & 50k. I know I close 1 out of 2 DMs...that's my personal LOA so I need to see 10 DMs this week so that's 2 per day to get my 50k in sales

Explain the whys behind EVERYTHING-why you cut bail so quickly with one DM when you stayed and shot the breeze with the other, why you skipped that one customer at 12:30 and not the other 3...why you closed the one guy and set up a callback for the other...EVERYTHING.

Professionalism – No talk of sex, drugs or well, rock and roll is okay.

### 4. Sales ability

- \* Stress the Laws Of Averages
- \* Stress the system

- \* Impulse factors
- \* Reading people-relating to people

## 5. Product Knowledge

- \* Make sure they know everything
  - Phone Calls
  - Tracking sheet
  - Callback vs. callback
  - Promotions
  - Definitions/appropriate lingo
  - Paperwork
  - Different situations they will run into
    - Partner is out of town, but co-owner is in – 50% ownership. Now what?
    - Wife makes all the decisions. Now what?
    - No one to set a 2nd measure. Now what?
    - Owner lives out of state. But son is in charge. Now what?

## 6. Office procedure

- Image
- Professionalism-no slang or cursing
- Rules and regulations
- How to participate
- Negs and posi-negs
- Goals
- Organization-being prepared
- Settle up process-re-stocking at night
- Numbers & daily reporting
- One-on-ones
  - Who to meet with? Why we do them? What to ask in them?

## Training Tips

- Only go as far as that person has done PERFECTLY before
- Set standards in the morning \$\$ and the day expectations
- Action-results training
  - I do, you watch
  - I do, you do (we do)
  - You do, I watch
- Be the perfect example...Strong work ethic, putting in the most effort
  - Promote the system not the campaign
  - Limit cell phone usage-cigarette breaks, etc.
  - What you do well they'll do 10% of, what you do bad they'll do 90% of
- Explain the why behind everything
  - Get in the habit of NOT telling them what to do
    - Teach them, DON'T tell them
- \*\*\*DO NOT WEAR THE NOS\*\*\* no difference from when you hear a YES to when you hear a NO
- Keep everything black and white
- Build professional relationships before personal...people need to trust you with their opportunity
- Point out the 4 factors of impulse after every customer
- Don't jump in to save sales; allow them to fall on their faces
- Be solution-oriented

## Expectations of a Leader

### 1. MANAGE NEW REPS

- Greet and talk to every new rep every day in atmosphere.
- Two new people should not be giving advice without a leader.
- Always walk a new person out to their car. As how their day really went. Answer any questions they may not want to ask in front of others.
- Manage and set your new guy's expectations every day.

### 2. BE A PACE SETTER

- Make at least \$30k every week
- Lead from the front

### 3. BE THE EXAMPLE

- Be 100% involved in all business functions
- Take on as much responsibility as possible. (Training, teaching, meeting, etc.)
- Be early every day. If you are not early, then you're late. Don't be that guy.
- Dress to impress. Dress for the job you want.
- Always have your leader's binder. Take notes on everything. This is your reference guide to your business.
- Be in atmosphere at all times. This is where you grow your business.
  - AM Atmosphere: 80% learning; 20% fun

### 4. TAKE RESPONSIBILITY

- No excuses!!! You can make excuses or make money, but you can't do both.
- Don't play the blame game. Remember, if someone doesn't know how to do something on your crew, it's your fault.
- Be a humble student. There is always room to grow and develop. Always take into consideration where you are getting your advice from. Ask why?

### 5. PROMOTE YOURSELF AND YOUR NEW GUYS

- Promote positives about your new guys in leader's meetings.
- Promote the big picture (goals, aspirations, vision).
- Set goals. (daily, weekly, monthly, yearly) – PROMOTE YOUR GOALS
- THINK BIG
- Meet with your managers at least once a week.
- Maintain a high standard for yourself and your crew. (\$\$\$, goals, professionalism)

## TRAINING

Biggest mistakes people make in training:

- Afraid to break someone. Being too nice
- Not pointing out four factors of impulse
- Making them drive in the first three days
- Not building professional relationship before personal
- Not being the perfect example
- Not being consistent
- Not having a training manual (scripted)
- Not using the training sheets
- Not promoting records
- Don't explain the why
- Not promoting road trips
- Wearing the no's
- Overloading the info
- Don't jump in to save sales; let them fall on their faces
- Being back late

## Top 20

### How to Promote Your Guy To Leadership

1. Leader calls and touches base (expectations, attire, parking, etc.)
2. Solid new hire paperwork
  - Build relationship
  - Expectations
  - Rules
  - How to get ahead
  - Open communication
3. 2 or 3 solid days with leader
  - Teach consistency
4. Spend time in the field with other leaders to become part of the team. (Jones Effect)
5. In-house training
6. Advancement meeting (within first 5 days)
7. Breakfast/Dinner with the owner/asst. mgr.
8. Attend team night and/or office night
9. Solid critical conversations
10. 1<sup>st</sup> check conversation
  - Expectations
11. Solid retain in the field/office
12. 1<sup>st</sup> day solo
  - Bonus thrown and earned
13. New leader dinner
14. Explain Mentality/Whys/BASOC



## Types of Interviews

1. Friendly Interview
  - a. Someone right out of college
  - b. Pulls the good out of every situation
    - i. Focus on work environment
    - ii. KISS it and have fun
2. Shopper
  - a. Been on a lot of interviews
  - b. Thinks the grass is greener on the other side
    - i. Bottom line of the job, talk about the good and the bad
3. Rocket Scientist
  - a. Always looking for the catch
  - b. Have a lot of questions
    - i. Tell the good and the bad
    - ii. Use your indifference
4. Adamant Interview
  - a. Already made up their mind on the way to go
    - i. Indifference
    - ii. Fit what they want to what we have
    - iii. Hit hotspots and ask questions
5. Partner
  - a. Live at home, or may have boyfriend/girlfriend, parents or spouse
    - i. KISS it
    - ii. Management training program
    - iii. Opportunity

# **How to Develop Leaders**

Rehash Call

1<sup>st</sup> Morning Set Expectations

Holster Theory

48 Hour Rule

Out Early

Setting Expectations – Business trips, coming in early, opportunity meetings, asking questions

TRAIN THEM! Teach them how to think vs tell them what to do

1<sup>st</sup> Day Solo

First 3 weeks, ease them in don't prejudge, after 3 weeks judge them

3 days, 3 weeks, 3 months conversations

Team Meetings, 1 on 1s, when to meet

## **How to Promote the Big Picture**

### 1) Have A Plan of Attack

- Set Goals: Have 3-4 short, medium, and long-term goals written down. Review them often.
- Create a Vision: No one will follow you without a specific destination in sight.
- Create a Blueprint of Success: Use specific action goals to lead you to the desired result goal.
- Don't Rush: Take everything one day at a time. Rushing is like cramming for a test; you retain information for a few days and then promptly forget it.
- Talk About Your Goals: Talk big. Believe in what you say. Show your guys how they will benefit in your vision. Find out what your guys' visions are and make them yours.

### 2) Surround Yourself With Symbols Of Success

- Display Your Vision: Keep a list or pictures of the things you ultimately expect to earn. It should be something you will look at and review everyday.
- Associate With Top People: Surround yourself with top leaders, management, and consultants. Learn from the people that are doing the best in their campaigns.
- Read Books: Get books on people who have been successful in sales, leadership, management, or life in general. Tell your guys about what you are learning. Apply the lessons you learn in your life.

### 3) Inspect Yourself And Set Expectations

- Be Your Own Worst Critic: Perfection is not attainable, but you should be trying to get as close as possible. Give your best everyday.
- Follow Through: When you set goals. Hit them and don't stop until you do. If you say you are going to do something for your guys, do it or risk losing their confidence in you.

### 4) Maintain Your Vision

- Don't Give Up: A vision is a "want" more than a "need" to most people. We must eat and sleep our vision in order to go after it for the long haul. Develop great habits. Our business is a marathon, not a sprint.

# **How to Develop a Leadership Mindset**

- 1) Setting Expectations With Your Trainee
  - People don't mind negatives they just don't like surprises
  - Its what they expect to happen that didn't happen that upsets people
  - As long as it makes sense it's cool.
    - 1<sup>st</sup> check, prepping for the day, splits, 1<sup>st</sup> day solo, setting goals, atmosphere, leaning on walls, coming in early to meet with people, the most a trainee can make in a day of training is \$100.
- 2) Teach your guys "how to think" not what to do – solution oriented, not problem focused.
  - Telling the person the why's behind things
  - If you tell them what to do you will always have to tell them what to do
  - Controllables vs. Uncontrollables
  - Can't means Won't
- 3) First 3 weeks EASE them in, don't prejudge, after 3 weeks judge and then PUSH them to EXCELLENCE or to QUIT.
  - Have fun – there is the structure to everything
  - You can only be as hard on a person as the relationship will allow
  - Don't listen to the nonsense
- 4) Ability to "see it coming"
  - Come back with nothing or come back early
  - Having a losing attitude
- 5) Progress over perfection; expect continued development and improvement in performance.
  - As soon as you figure out the answer they change the question
  - It's not in the form of the numbers or the money but in the experience and growth
- 6) Integrity is key
  - Always do the right thing especially when no one is watching

"Success in business requires training and discipline and hard work. But if you're not frightened by these things, the opportunities are just as great today as they ever were."

-David Rockefeller

The New Guy's Mentality

They are not closed; they want to see how their first day goes to see if it works out.

- They need to like who they work for'
- They need to like the job
- They need to feel like they can do the job and make money
- They need to feel like they have accomplished something

Why the new guy finishes training

- Environment/coworkers – People want to like who they work with
  - \$\$ - They can make some – Let them do some work, let them think
- Advancement – recognition of contribution – Let them know what they are doing well

How they need to feel when they leave everyday for their first two weeks

- Excited about work (that particular day)
- Feel as though they have learned or made progress that day
- Feel as though they will learn and make progress tomorrow
- Excited about coming in tomorrow
- That any mistakes that were made are NO BIG DEAL and that they can totally do this job

Resources you have:

- Atmosphere
- Other leaders, new guys and manager

# **Standards for Team Building**

A degree or level or requirement, excellence, or attainment.

Standards are who you are and what you stand for! By implementing standards you will gain respect, perform to your fullest potential and BE OPEN FOR BUSINESS! Your job as a leader and manager is to “force a reaction and maximize potential”. Your managers have a bar and standards. what are yours for success?

## **GOALS**

Expectations – What do you want out of this and where are you leading the team?

- Define – Be specific
- Action Plan – Pinpoint a strategy, Sunday night game plan, don’t wait, PUSH YOURSELF!

## **TIME**

- Punctuality/Attendance – Respect yourself and the office. Missing a day is like missing a week, NO EXCUSES.
- Making it Count
  - Atmosphere – get your recognition (bell and speak time). Network with new and top people.
  - Field – Training and setting the pace for the team.
  - Team Dinners – Goal set, build relationships and strategize.

## **IMAGE**

Have a business sense, you can only attract people as sharp as you.

- Perception – Your confidence and your result, CREATE IT!
- Professionalism – Articulation, Dress and Handshake. Fortune 500 Client = Fortune 500 image.

# **Team Building**

## **First things first (THE PERSON YOU HAVE TO BE)**

- Your team will emulate you!
- What you do right, they'll do less!
- What you do wrong, they'll do more!

## **Attitude**

- Field, office, everywhere you are 24/7

## **Image**

- Sharp breeds sharp
- 1<sup>st</sup> impression is everything, make sure that you are impressive

## **Dependability**

- If you say you're going to do it; do it! Go the extra mile for your guys

## **Reliability**

- Doing more than anyone else. Be on time

## **Productivity**

- Set the pace, be the go to guy
- Don't ask your guys to do anything you won't

## **Being a Good Student**

- Be the best student you can be and so will your guys. Never think that you can't learn, have the willingness to learn

# **Team Building 101**

Building your team will be one of the most challenging things you will ever do in your career. Some of the guys you are working with today will never build a team and won't be around for tomorrow. The most common reasons for failure are lack of preparation and frustration.

Before you will be ready to develop others, first you must learn to develop yourself.

## **Skills One Needs To Develop**

- Positive Attitude
  - You must be a person that is enjoyable to be around
- Be a Good Example
  - If people on your team are going to learn from you, you don't want them to learn bad habits from you. They'll learn enough of those on their own.
- Positive Talker/Promoter
  - Be able to genuinely get others excited
- Know the Answers
  - You will be asked hundreds of questions, if you don't know the answers you need to ask more questions.
- Have Goals
  - You must have a path to success that others can follow you down

The key to building a strong team is to get so on top of your game that a team will develop the above skills into themselves. The sales are a by-product of what we do, but it's how we all make money. People need to know they can pay their bills. If you aren't making any, how can you expect them to make any?



## **Dreams and Goals! Know Your Why!**

Driving Question: If you had all the time and all the money, what would you be doing? Where would you live? Where would you vacation? How would you contribute?

<b>Focus Area</b>	<b>Your Reality – How's your life today?</b>	<b>Your Future – What do you really want?</b>
Your Home		
Your Job		
Your Income		
Your Vacations		
Your Time (Got any to spare?)		
Your Finances (Any Debt?)		
Your Family		
Your Contributions (Charities, Giving time/energy)		
Your Car		
Your Investments		
Your Retirement Plan		

Your hobbies		
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## **Employee VS. Entrepreneurial Mindset**

EMPLOYEE	ENTREPRENEUR
<ul style="list-style-type: none"> <li>• Do stuff because someone told them to do so</li> <li>• Take a check at the end of the week</li> <li>• Look for as big a portion as they can</li> <li>• Satisfied doing just enough to get by</li> <li>• Call in sick</li> <li>• Always find the problem in situations</li> <li>• Attitude is dependent on what is happening to them</li> <li>• Only work hard to impress the boss</li> <li>• Not willing to make the uncomfortable decision</li> <li>• Reacts to the situation</li> <li>• Want what's best for themselves</li> </ul>	<ul style="list-style-type: none"> <li>• Comes in early/stays late and gets the job done because nobody else will do it for them</li> <li>• Takes ownership</li> <li>• Creates the portion to give out</li> <li>• Goes above and beyond</li> <li>• Always shows up</li> <li>• Always finds the solution to the problem in each situation</li> <li>• Works hard no matter who's watching</li> <li>• Plan ahead and be proactive</li> <li>• Create a better life for themselves</li> <li>• Make do with what they have</li> <li>• They thrive under pressure – they want the ball</li> </ul>

# **Effective Goal Setting**

Make sure your goals are SMART

**S**pecific

**M**easurable

**A**ttainable

**R**evisable/**R**elevant/**R**ealistic

**T**imely

And always remember to PLAN AHEAD

**P**redetermine a plan of action

Blueprint for where you want to be – See every possibility

**L**ay out your goals

Promote the goals that you have

**A**adjust your priorities

**N**otify key personnel

People in charge ahead of you/let them know your goals

**A**allow time for acceptance

It isn't going to happen overnight, be willing to adjust the time table

**H**ead into action

Lead by example, don't wait for others

**E**xpect problems

"Life Happens"

**A**lways point to the successes

Praise effort

**D**aily reviews of your plan

# **Failing to Plan Means You Are Planning to Fail**

**Hard Work + Preparation = Success**

## **When do I prepare for the new week?**

- Sunday Preparation – Why? Where? When?
- Review Last Week – How was your/your crew's production? Who trained/interviewed? What were the results? Who had responsibilities?
- Plan 1 on 1s – When are you meeting with your manager one on one? When are your guys meeting with your manager? When are you meeting with your guys?
- When are crew breakfast/crew meeting?

## **How do I know what to focus on this week?**

- STOP, START AND CONTINUE

## **Decide what you want then keep it simple.**

Simple Instructions:

- List 2 things you must stop doing
- List 2 things you must start doing
- List 2 things you must continue doing

Do not over think this. Just pick two actions for each. Then focus on those actions for the next seven days. Nothing more – nothing less. With this exercise you will simply identify what is holding you back (STOP), what you must do (START) and lastly, what are you doing well (CONTINUE). Talk to your mentor or someone you trust. Ask for his or her input to correctly identify where your focus should be. Finally, ask them to hold you accountable to do these things. Ask them to give honest and timely feedback.

## **What does a great week look like?**

- Begin with the end in mind – how do you want this week to turn out? Visualize it.
- Be productive during your mornings and evenings.

- Keep track of how you are doing throughout the week – hold yourself accountable.
- Everything depends on the follow through

### **GOAL SETTING & TEAM MEETINGS**

The goal sheet is the most important document in your leader's book. It is the "know why I'm here and what I'm doing" part of your business.

Keys to goal setting:

- Set goals night before (set weekly goals on Sunday)
- S.M.A.R.T. (Specific, Measurable, Attainable, Revisable, Timely)
- Evaluate goals after the day is finished
- Identify what areas need to be worked on.
- Develop a "whatever it takes" mentality. Ferociously strive to achieve your daily objectives.
- To become an assistant manager: simply hit 8 weekly goal sheets consecutively (great rule of thumb)

Team Meetings should be run every morning for at least 10 minutes. It gives you the opportunity to share each other's goals, hold each other accountable, and it gives you a chance to cast your vision.

The Team Meetings prepare you for ownership. Once you are a leader you should conduct your own crew meetings – no matter the size of your team. You are the "captain of the team" and your people are the players.

Tips:

- Compete with your people – Challenge them!
- Motivate your people – Inspire them!
- Humble yourself if you are not hitting your goals. Expose yourself and use yourself as the example (good and bad) – Humility.
- Educate yourself to become a great speaker – Read good books.
- Reinforce the vision of the team – Promote your location!

## MONEY MANAGEMENT

If you can accurately forecast your costs and sales, conducting a breakeven analysis is a matter of simple math.

We work off commission sales! Therefore, the amount of money a rep can make in the field is practically unlimited! Prior to finances becoming a concern, conducting a breakeven analysis will help your new guy set weekly production goals, as well as teach him/her how to budget appropriately from paycheck to paycheck.

It is important to keep in mind that breakeven points are determined by tracking (1) month's total expenses. For example:

Cell Phone  
Car Payment  
Car Insurance  
Gas  
Rent / Mortgage  
Meals / Entertainment  
Miscellaneous

First, multiply all items x12 (months in a year), then, multiply that total 52 (weeks in a year). This number will give you the salary you must make over the course of a year. To determine your weekly breakeven, divide that total by 52.

Top (10) Reason's You Don't Have Money:

You care too much about what others say.  
You have no patience, and charge everything to credit card.  
You have bad spending habits.  
You have no specific financial goals.  
You haven't prepared yourself properly, ie. Determining your breakeven.  
You're just trying to make a "quick buck".  
You rely on others to take care of you, or your financial obligations.  
You invest in things you don't necessarily understand.  
You are financially paranoid.  
You ignore your finances all together.

*\*\*Tips & Tricks: While tracking your monthly expenses, write the purpose of each expense on the back of each receipt. It is important to separate your want's from your need's.\*\**

## 10 BEST IDEAS FOR SETTING GOALS

- I. Make A List of Your Values
  - a. What's Really Important To You?
  - b. What Are Your Values?
- II. Begin With The End In Mind
  - a. Where Do You Want To Be In 5 Years From Now
- III. Project Yourself Into The Future
  - a. We Become What We Think About
    - i. Pretend Like You've Already Reached Your Goals – Walk Talk and Act Like You Would
    - ii. Act Like An Entrepreneur
- IV. Write Down 10 Things You Want This Year
  - a. Make A List
    - i. Manage Needs
- V. Check Your Storyboard
  - a. Make A Collage Of The Goals That Excite You
- VI. The Three Most Important Things
  - a. What Three Things Do You Want To Achieve By...
- VII. Ask Yourself a Good Question
  - a. Wishing vs. Acting
- VIII. Focus On One Project At A Time
  - a. Laser – Beamed Focused Attention
- IX. Write Out An "Ideal Scenario."
  - a. Imagine YOUR Success Article Published
- X. Take Control
  - a. Vision Your Accomplishments
  - b. Take Control Of Your Future

## **WHY LEADERS FAIL**

- 1) Arrogance – think they are ‘too cool for school’; don’t follow the standards of the office
- 2) Melodrama – they need to be the center of attention; they always have something going on that everyone ‘needs’ to hear about
- 3) Volatility – they are subject to mood swings; do not maintain their attitude, very up and down
- 4) Excessive Caution – they are afraid to make decision (not empowered enough)
- 5) Habitual Distrust – they always focus on the negative
- 6) Aloofness – they are disengaged and disconnected
- 7) Eccentricity – they try to be different just for the sake of it
- 8) Eagerness to Please – they try to win a popularity contest
- 9) Passive Resistance – what they say is not what they believe
- 10) Perfectionism – little things are always in place instead of the big things (making badges instead of being in a leader’s meeting)



## **10 REASONS PEOPLE ARE IN THE FIELD TOO LONG**

10. Too much partying (not a good example outside of the office)

9. Complaining

8. Lunch in groups

-S.O.U

-Misery loves company

7. Lack of Money

-Break Even

-Budgeting

-Don't make money in the field

6. Don't spend time with their guys

-One – on – Ones

-Positive Affirmations

-Quick Conversations

-Appreciate your guys

5. Being a part of the group as opposed to leader of the pack

4. Problem Conscious vs. Solution Oriented

-2 Minute Problem (2%) vs. 20 Minute Solution (98%)

3. Lack of Accountability

2. Laziness

1. Not Listening/ No Excitement

## **BUILDING SUCCESSFUL RELATIONSHIPS**

People don't care how much you know until they know how much you care. To truly be an effective leader, you must develop a high level of trust and interest in your people.

Your promotion to management is directly proportionate to the amount of personal time you sacrifice for your people.

Tips in successful relationships:

- ⇒ Get to know them personally (learn the intimate things about them that only their best friends and family know)
- ⇒ Spend time away from the office with them
- ⇒ Find their personal motivations – “Hot Buttons”
- ⇒ Get to know their loved ones – get their support
- ⇒ Spend quality time with quality people
- ⇒ Involve them in your personal life
- ⇒ Set goals together
- ⇒ Take an honest interest in helping them succeed
- ⇒ Remember important things – examples: birthdays, anniversaries, special dates, special interests, hometown, college attended
- ⇒ Business first, then pleasure
- ⇒ Quality time vs. Quantity time

## CRITICAL CONVERSATIONS

1. Importance of 1 on 1 meetings is often overlooked
  - a. Can't rely on meetings alone to motivate your people
  - b. Not everyone is at the same level
  - c. Ability to have 2 minute conversation and really HIT HOME is essential
  - d. Motivation has to be REAL and Personal to be long lasting
    - i. This teaches people to find their own motivation
    - ii. Makes the internally motivated instead of externally motivated
2. The two main areas I want to cover today are
  - a. The main components of a successful one on one
  - b. Exactly what conversations to have and when
3. There are three main components to a successful one on one
  - a. Timing
    - i. Timing is important because it determines how today projects into the future
    - ii. This is where you determine where someone's head is,
      1. Where is someone's mindset
      2. Where should it be?
      3. How can I get their head closer to where it should be if it's not there
    - iii. We tend to speak to someone either too soon or too late
      1. Too Soon
        - a. It can overload or overwhelm people
        - b. Give "where are babies made" example
        - c. Why we don't talk to someone about being an OWNER on their first day
      2. Too Late
        - a. People need to know what to expect
        - b. Like warning someone that the pizza is hot once they taken a bite
        - c. Don't wait to tell someone that they may struggle once they've had 2 hard days in the field and are sitting in front of you ready to throw in the towel.
        - d. People don't mind negatives, they just hate surprises.
  - b. Being a Great Listener
    - i. For some reason, as we grow in this business, we tend to start sounding like a broken record – repeating clichés and giving cookie-cutter answers (territory example)
    - ii. To get good at motivating people we have to get personal, and that means listening.
    - iii. What this opportunity means to one person can be completely different than to another.
      1. For some people – money, fun, travel, single life
      2. For some people – family
      3. What is their TRUE motivation?
    - iv. What this means to you:
      1. Don't be the person who's good at speeches

2. Be the person who's good at CONVERSATIONS

c. Forecasting

- i. As you grow and develop in business, things will rarely surprise you.
- ii. You will begin to see things before they happen.
- iii. This is the art of forecasting. The more you forecast:
  1. The more prepared you will be
  2. The more prepared you will help others to be
  3. The more confident you will be
  4. The more confidence you will inspire
  5. We find ourselves HOPING things will go well so that we don't have to deal with negatives
  6. Instead, we should prepare people for negatives so that, when they happen, people will be more prepared and people will be more inclined to listen to what you have to say in the future.
- iv. Here are examples of when it is important to forecast.
  1. People who are initially excellent at sales
    - a. Let them know that sales alone won't cut it.
    - b. They HAVE TO follow the system, because not everyone has their natural ability.
    - c. If they want to advance, they have to remain humble.
    - d. Let them know that they MAY struggle in the future with sales, they may not, but they WILL struggle with SOMETHING. Not everyone hits a slump in the field this day; Elana Stein has the bell EVERY day she's EVER been in the field.
  2. People with a high personal break even.
    - a. Don't be afraid to talk about money HONESTLY and OPENLY
    - b. People need to have realistic expectations of what they will make
    - c. Sit down with them and go over their breakeven / help them budget.
    - d. Follow up the initial meeting with weekly meetings to make sure they are hitting it.

→ Priority is to put you in a position to be GOOD AT SALES

→ You may / may not pick it up immediately

→ Keep student mentality and work to improve

You'll be judged on that, not on how quickly you pick up the sales.

Obviously we told you that there is an opportunity to grow, once you start to get the hang of things, we'll sit down next week and go over details.

v. Day before they should go solo

1. They should be excited.
  2. Let them know that the next step is essentially to get them working for themselves
  3. Ask them when they think they'll be ready to go solo (99% of the time they'll say tomorrow)
  4. Make it THEIR decision.
  5. Don't be concerned about \$\$ or apps.
  6. We're going to use tomorrow to gauge your skill level.
  7. If you get told "YES", sign up and forget them.
  8. If you get told "NO", forget that too.
  9. Keep a GREAT tracking sheet, and we'll sit down and see where your skill level is and see what we can do to continue to help you.
  10. This takes the pressure off.
- vi. Once they have seen a pre-management meeting/after a week or week and a half. This should be when they're starting to push for leadership.
1. Have you set any goals?
  2. They'll tell you they want to be a manager.
  3. "I see a lot of potential. I see things that would get people to look at you as more of a leader. Do you want me to let you know?"
  4. This gives you an open door to work on things with them.
    - a. Be early
    - b. Active/presence in atmosphere
    - c. Meet with people
- vii. New Leader
1. We tend to abandon people when they get to leadership.
    - a. We forget that they're SO new to our business.
    - b. We stop developing them and expect them to learn on their own.
    - c. We forget about transfer of knowledge.
  2. Congratulate them, but let them know that you're still there for them.
  3. Let them know what to expect.
    - a. First you'll start training day  $\frac{3}{4}$ .
    - b. Then you start training day  $\frac{1}{2}$ .
    - c. Then you'll start interviewing.
    - d. You won't have a chance to start building your crew until you get some practice on other people's guys.
    - e. This way, once you start building, you'll already know what you're doing.
  4. Remember, as their leader it is still YOUR JOB to make sure that they continue to see growth. These are the people who will be your partners as you open up your own office.
4. Close
- a. If you take away nothing else from this, remember the importance of **1 on 1 meeting**.
  - b. There is no team night, no meeting, that will take the place of the 1 on 1 time you invest in your people.
  - c. Make sure the time you spend is quality – not just fun stuff – learn to make a difference in someone's career and life in a two minute meeting.
  - d. Learn to forecast.

- e. Learn to plan your 1 on 1 meetings to fit your people.
- f. Remember that, with your people, as with anything, what you put in is what you get out.
- g. And that great leaders are not great at talking to people, they're great at talking WITH people – at HELPING people reach their own conclusions and drive their own success.

## GENERAL POINTS

- Only go as far as that person has done PERFECT before
- I do, you watch

I do, you do (WE do)

You do, I watch

- Be the perfect example – strong work ethic, putting in the most effort. They'll do 10% of what you do well and 90% of what you do badly.
- Explain the whys behind everything (get in the habit of NOT telling people what to do)
- \*\*\*\* DO NOT WEAR THE NO'S \*\*\*\* no difference from when you hear a YES to when you hear a NO
- Keep everything in black and white
- Build professional relationship before personal – people need to trust you with their opportunity
- Point out the 4 factors of impulse after each person
- See enough people
- \*\*\*\*PEOPLE WILL GENERALLY MAKE IT THROUGH TRAINING IF THEY LIKE YOU AND THEY CAN REPLICATE WHAT YOU DO\*\*\*\*

## HIGH ROLLER SPEECHES

“Leadership is based on inspiration, not domination; on cooperation, not intimidation.” – William Arthur Wood

1. Keep it short and simple
  - Focus on one, and only one, of the 4's, 10's, and 8's
2. Be prepared
  - Prepare your speech the night before with a leader
  - Do not ramble, stick to one topic and use that one only
3. Avoid posi-negs
  - Discuss positives only
4. Introduce the topic
  - Example: “what worked for me yesterday was Jones effect.”
5. Let your new guy talk
  - If it was their first day in the field, then let them introduce the topic. Ease them into it, but make sure that you go over it with them before they give it. This is a chance to get recognized as a top producer. Understand that everyone in the office is listening and also knows you high rolled the office, you should shoot to do one every day.

## IMPACTS

“Good leadership consists in showing average people how to do the work of superior people.” – John D. Rockefeller

1. Teach the new guys
  - Impacts are focused on teaching new guys an aspect of the system (4's, 10's, 8's) that they need to work on. You should have broken down multiple new guys days the night before, so you should know what a majority of them need to work on.
2. Never posi-neg
3. Make it interesting
  - Use something that happens in everyday life and relate it to the business. The more people you can get involved in your impact the better
4. Keep it short and simple
  - Your impact should not be very long. 1-4 minutes is sufficient time to get your point across



## LEADERS WORKSHOP TRAINING

1. Day 1 training
2. Day 2 training
3. Day 3 training
4. Day 4 training
5. Setting the agenda
6. Ride out
7. Maintaining the flow of conversation with interview
8. CDC
9. Explaining the business
10. Challenging interviews
11. Impacts
12. High Roller Speeches
13. The industry
14. Business trips
15. Critical conversations
16. How to run campaign
17. Formal feedback
18. Theories
19. Being prepared
20. How to keep new guys
21. Module training
22. Being a good leader
23. Developing new guys
24. Business books

## IMPACTS

### BIGGER GOALS

#### Paper jump

- Select volunteer
- Place piece of paper 1 foot away, have them jump on it
- Place paper 2 feet away, have them jump on it
- Place paper 5 feet away, can't reach it
- POINT: If you set big goals, you will far surpass your smaller ones

### LOA'S

#### Deck of cards

- Assigns a d/m to each type of card
  - Example: Jack = not interested, King = has Fios, Ace = Sale
- Passes out to ten reps and pitches until finds desired card
- POINT: Every deck (the field) has the desired card (sale). Trust in your LOA's

### DON'T CARRY YOUR NO'S

#### Weighted down

- Rep asks for everyone to pick something up
- Part 1:
  - Carry's object from each no
  - Eventually weighed down by the time rep gets to yes
- Part 2:
  - Doesn't carry object from each no
  - No longer weighed down by the time rep gets to yes
- POINT: If you don't carry your NO's and keep a great attitude, you'll find your YES's every time

### TAKE CONTROL

#### Call me a doctor

- Get a volunteer to acts as a patient with an ailment
- Part 1
  - Patient complains about ailment. Doctor proscribes many different methods such as rest, surgery, aspirin, surgery, and Robitussin to cure it. Patient leaves.
- Part 2
  - Patient complains about ailment. Doctor says "take two aspirin, get some rest, and your headache will go away".
- POINT: You are the expert and no what's best for the customer. Don't give them options, just tell them what's best and take control of the situation

### Clean your room

- Get volunteer to play out parent and child scene
- Part 1
  - Parent ASKS child to clean their room. Comes back and see's it is not done
- Part 2
  - Parent TELLS child to clean their room otherwise they get no TV. Comes back later to see that it is done
- POINT: Don't ask your customer for things. Use proactive language and politely tell them what to do

### SAVE YOUR BULLETS

#### Pen toss

- Has ten pens in hand and asks a volunteer to catch them
- Part 1
  - Throw all ten at once and only catch a few
- Part 2
  - Throw one at a time and catch all of them
- POINT: Don't throw out all your bullets at once

### JONES EFFECT

#### "Quack"

- Slowly quack until everyone else joins in
- POINT: If you let people know that everyone else is doing something, they'll have no choice but to conform and want to join along

### K.I.S.S

#### Paper plane

- Give piece of paper to each rep in the room and place trash can in the middle of the room
- Part 1
  - Everyone makes a plane and tries to make it
- Part 2
  - Everyone crumples a plane into a ball and shoots
- POINT: Don't overcomplicate in the field. Just keep it short and simple and you'll make more shots and get your YES's

#### Ingredients label

- Grab a candy bar and a volunteer
- Part 1
  - Read the ingredients and ask if they'd like to buy

- Part 2
  - o Say it tastes good and ask if they'd like to buy
- POINT: Keep it simple and don't overcomplicate by telling the customer everything.

#### Good directions

- Ask for a volunteer and ask them to come to a party
- Part 1
  - o Give overcomplicated directions involving measurements, street names, and obscure landmarks
- Part 2
  - o Give simple and concise directions
- POINT: Keep it short and concise so customers don't get overwhelmed

#### MIRRORING YOUR CUSTOMER

- Who's coming to my party and what are they bringing
- Only people who mimic the body language and figure out the rule can come
- Rule: They must bring two objects that match their initials
- Example: "My name is Tom Cruise and I'm bringing tangerines and C.D's"
- POINT: You have to mirror your customer's body language and speak like them in order to get your point across

## OFFICE JOBS

### CAMPAIGN

- The person on campaign puts everyone's numbers into the Production log at the end of every day and types up Production every morning.
- They also run campaign every day in order to show the office what it's doing well and what it needs to work on based on the numbers received.
- 

### HANGBACK

- The person on hangback teaches all the entry-level members of the office about sales and product knowledge.

### CRUISE

- "Hey Guys!" "Hey What!?" The person on cruise keeps the office organized and on pace by making sure everyone smoothly moves from one part of the morning to the next (ex. From goals to campaign)

### PITCH MASTER

- The pitch master comes up with a focus for practice pitch, in order to make it more effective

### TIME KEEPER

- The time keeper fills out the names and office codes on time sheets on Sundays for everyone to fill out

### RETENTION

- The person on retention checks to make sure installs from the day prior took place and lets representatives know about any jeps or cancels they may have had.
- They also let representatives know about installs they have taking place that day and the next day.

## **RECOMMENDED BOOK LIST**

How to Win Friends and Influence People

One Minute Manager

Rich Dad Poor Dad

Seven Habits of Highly Effective People

Think and Grow Rich

Who Moved my Cheese

The Education of Millionaires

The Art of War

The Psychology of Selling

The \$100 Startup

Relentless

## 17 BAD HABITS THAT CAN MAKE MILLENNIALS LOOK REALLY UNPROFESSIONAL

### 1. Not really understanding entrepreneurship.

"Too many Millennials don't understand the difference between being an entrepreneur and doing something entrepreneurial. ... [W]e see so many stats about how many Millennials want to work for themselves someday because they've grown up in a time where the tech world has made them believe everyone can do everything. That's just not true. So what should they quit doing? They should quit thinking that working for themselves is the only way -- or even the best way -- to experience what it means to be entrepreneurial, make a big impact, and enact important change."

--Mike Maughan, head of insights, [Qualtrics](#)

### 2. Acting overly entitled.

This one is almost a cliché at this point, but we still hear about it.

"The problem is, there's a correlation between self-motivation and self-entitlement, and a very thin line between confidence and arrogance. ... Millennials push themselves very hard, [and] their need for purpose causes a great deal of them to be intrinsically motivated. We just need to realize that sense self of purpose that we have CREATED for ourselves is not more important than anyone else's."

--Reza Jafery, [Casual Solutions LLC](#)

### 3. Being overly certain.

"We Millennials can be very confident, which can be electric and motivating to those around us--but only when it's actually authentic. Bottom line: If you don't know the answer to a question, don't pretend to be an expert. It's OK to be uncertain, and it's better to be honest about it rather than exude false certainty."

### 4. Lack of focus.

"I'm a Millennial and I run a company where most of my staff consists of Millennials. The bad habit I'd like to mention is lack of focus due to constant distraction. Generation Y grew up in front of a TV, bombarded with new stimulus every 15 seconds. As a result, it's an uphill battle for many to regain the ability to retain focus for a long period of time. The web and mobile devices don't exactly help alleviate this habit either."

--Orun Bhuiyan, co-founder, [SEOcial](#)

### 5. Only being out for themselves.

"Leading today is all about creating true collaboration and teamwork. This is not a strength of Millennials. ... I see it often--great technical expertise but no idea how to relate to people. Maybe it is/was all those hours on their smart phones."

--Lawrence Polsky, co-founder, [Teams of Distinction](#)

### 6. Refusing to pick up the telephone.

"So much of business is still done by phone. ... You can't text a CEO to ask him to consider buying your product which you wrote as a string of emojis. Even if he thought it was a brilliant tactic, he'd likely pick up the phone to call you about it. Make sure you answer it and sound professional."

--Meagan Nordmann, [RiskSense](#)

#### 7. Inability to take or give criticism.

"They are often afraid to hurt someone's feelings instead of spark progress. ... On the flipside, Millennials also need to better understand how to take criticism. If I were to tell the average Millennial that he or she just created something that was a good try, but no--they would likely be upset. ... Millennials are a sensitive generation, the most sensitive in history, and [they] need to work to be less petty when it comes to reacting to what is said to them."

--Adam Lawrence, [StrollingWild](#)

#### 8. Talking more than listening.

"As a Millennial, our primary goal should be to ... learn as much as we can from other people. ... Not only that, if you want to build rapport with anyone, you need to show you're interested in what they have to say, and listening is an essential factor in developing rapport."

--Sean Kim, CEO, [Rype](#)

#### 9. Acting too cool to care.

"I've come across quite a few younger people with the notion that 'not caring' is somehow super cool. I think it's impossible to be successful with this outlook. In my companies, really caring and giving it my all is a huge part of what allowed them to grow and succeed."

--Louisa Levit, co-founder, [Unexpected Ways](#) and [Reliable PSD](#)

#### 10. Freaking out when making mistakes.

"I'm a Millennial, and my generation got gold stars for pretty much everything. Now we're in the working world where if you make a mistake and get called out for it, [it seems as if it's] almost a better idea to jump off a cliff than come into work tomorrow. Mistakes happen to everyone. ... They do not mean your career is over."

--[Heather Taylor](#), freelance writer

#### 11. Too much multitasking.

As a Millennial ... we think we are very efficient at multitasking, but being in business has taught me that it is not always right to multitask or to hop on new projects like a bunny."

--Salman Aslam, CEO, [Omnicores](#)

#### 12. Expecting too many perks.

"Millennial candidates should forget what they see in the movies and read on social media, and focus on the career opportunity instead of the perks. If you don't work for a Silicon Valley tech giant, you probably won't have daily catered meals, a full-time barista, and free dry cleaning delivered to the office."



Expecting (and asking for) those ... high-end perks can make a candidate seem out of touch and a potential prima donna."

--Lauren Bigelow, executive director, [Accelerate Michigan Innovation Competition](#)

13. Not properly owning their Millennial-ness.

"Millennials should use their unique voices. Most of the consumer world is Millennial, and sharing the consumer's voice is valuable. However, you need to be articulate and crisp. Also, they should use the word 'awesome' in moderation. It's become the go-to Millennial phrase, but it's overused. Be youthful, but have a range of words that express excitement or pleasure."

--April Masini, [AskApril.com](#)

14. Not being willing to take time to learn.

"I have been hiring positions [and] the requirements [include] a real estate license and a three-month training period. ... No Millennial we've encountered wants to take their time to train through a process, [so] our most recent hire has been someone in the Baby Boomer generation."

--Steven Clarke, [Steven Clarke Real Estate](#)

15. Not being able to disconnect.

"Millennials make the best salespeople. ... They often don't see a hard line between their work and personal lives, which makes using social sites like Instagram and Twitter very effective for making business connections ... but this has also come at the cost of ever-important face-to-face meetings and networking. Millennials need to kick the habit of being tethered to their devices 24/7/365. There is something to be said for Millennials who know when to put down the smartphone and have an in-person conversation."

--Adam Honig, co-founder and CEO, [Spiro Technologies](#)

## **Professionalism**

- Conduct, aims, or qualities that mark a profession or a professional person
  - Start by waking up with enough time to get dressed and get to work early
  - Be prepared for the unexpected
  - Be clean and well kept
  - Talk positively about work
    - Carry your attitude all the time
  - Set professional goals
- Standards
  - Our Dress
    - Suits ironed
    - No open toed shoes
    - No tattoos showing
  - The way we speak
    - Business professional language – no slang
  - How you carry yourself

## **Public Speaking**

Being in front of a group and practicing public speaking skills are integral parts of business. Public speaking opportunities include high roller speeches, impacts and running weekly campaign meetings.

High Roller Speech: Purpose is to state one area of the system that specifically worked well for you the day before, along with a short term and long term goal. This brief moment is meant to separate an individual as a top performer and positively impact the energy in the room.

Example:

1. What worked for me was using my SEE Factors and smiling at every customer
2. If it worked for me, it will work for you. I'll see you on Bell, Gong and.... (BEYOND)
3. My short term goal is...
4. My long term goal is...

Impact Writing: Impacts are brief examples of how a part of the system relates to a real life scenario. Impacts are subject based and should be fairly interactive. The subject of the impact is picked by the high rolling leader the night before it is to be delivered and it is meant to correlate with what the majority of the account reps need to work on for that day. Impacts must be thought out and relevant.

Example:

1. Who here has ever done.....?
2. Tell a real life story or use an example
3. Relate an aspect of the story to the systematic approach.
4. Finish the story or example and ask everyone "So how does this relate to the field?"
5. Yes! If you do that I'll see you on Bell, Gong and.... (BEYOND)
6. My short term goal is...
7. My long term goal is...

Running an Effective Campaign: The purpose of the Campaign is to empower the sales abilities of the office: evaluate common sales scenarios, address new product promotions, and teach how to apply the 4's, 5's and 8's to the field. Campaigns should be discussed with the manager to go over numbers and rankings.

The goal is to make them as interactive as possible.

### Drills:

A drill is an interactive training session that strengthens the team's familiarity with overcoming objections, buyer types, sales theories, and the 4's, 5's and 8's. It allows each individual to practice their pitch as well as evaluate how other people handle common field scenarios. A drill usually lasts about 10 minutes.

### Theories:

A theory is a visual interpretation of a technique that is used in the office to strengthen different parts of the system. Theories are great teaching opportunities for newer leaders to present something in front of the room.

### Games:

A game is a fun and exciting way to teach product knowledge and new promotions. It is important to have fun/ make money.

### Giving Recognition:

Giving recognition to the weekly high rollers is extremely important. It shows who the most valuable resources are in the office. Refer to the weekly production log for the top ballers.

## Meetings

“Many of life’s failures are people who did not realize how close they were to success when they gave up” – Thomas Edison

### 1. Morning Meeting

Run by a manager, assistant manager or leader of the week. They follow the announcements and are the point of contact before everyone leaves for the field. They are used to make reps understand what the field really is and how our opportunity is created because of the field. Morning meetings go more in depth into the system and how it relates to life inside and outside the business.

### 2. Business Trip Meeting

Are no different than being in the office. The purpose of a business trip is to teach a leader or crew what it is like to run an office. It is the closest experience a leader will have in running a office until they have their own. It is a huge privilege to run one as a manager puts a lot of trust in a leader to run a road trip. Atmosphere should run as normal. It will be one of the only times a leader will have to run a morning meeting so take advantage of running business trips.

### 3. Crew Meeting

Once you have someone on your crew, you will want to meet with them regularly. Their success insures your success. This is your opportunity to talk big picture to your guys. Make sure you go over high rollers, responsibilities, etc. Use this time to set daily goals for your guys and your crew. It is a chance to build more of a bond with your guys and get everyone on the same page. Your crew should always feel comfortable coming to you with questions or concerns.

### 4. Campaign Meeting

- a. Campaign meetings are the first meeting of the morning and cover new rebuttals, new paperwork, changes in product service information, etc. They are targeted toward whatever the office needs to work on most.

# Why We Do What We Do

“A complex system that works is invariably found to have evolved from a simple system that works” – John Gaule

- Atmosphere
  - What is the purpose of morning atmosphere?
    - Morning atmosphere gears people up for the day; it's the pre-game warm ups. It gets energy up and people excited to hit the field running. Morning atmosphere should be 80% learning and 20% fun. Activities include practice pitching, educational games and crew meetings.
  - Why do we have a daily schedule?
    - A daily schedule keeps us on track of our morning so we can cover all we need to and still hit the field in a timely matter. One leader on cruise control will yell out “Hey Guys!” to get everyone's attention that we are moving on to the next thing.
  - Why don't we lean on the walls?
    - It is unprofessional to lean on the walls and it shows that you are not attentive to the current activity.
  - Why don't we take food or drinks into atmosphere?
    - Food and drinks can be spilled and leave a stain in the office.
  - Why do we work long/weird hours?
    - We work long/weird hours because we want to pay now so we can play later. We make the sacrifice now so that we can reap the rewards later in life.

# Building a Crew

- Image
  - Habits
  - Appearance
  - Things you say
  - Bait for catching a crew
  - Relate to different types of people
  - Be critical of self
  - Ask: Why would someone follow me?
- Motivate people
  - From heart, not surface
  - Be honest and relate
  - Talk a lot about what ifs and I've seen
  - Do I react or respond
- Extra Mile
  - Makes more money
  - Guys learn more from you
  - Set example
  - Build relationships
  - Makes you look strong
- Treat everyone on your crew as an individual
  - Maximize their abilities, not their disabilities
- One on One Meetings
- Meet their friends, family and relatives
  - Find out where they come from
- Be yourself and downplay the business
  - Tell them you don't know if your guy can do it
- Team Events
  - Movies, brunches, etc.
  - No alcohol
  - Make your team a part of what's happening
  - Talk about goals
  - Get excited about progress
  - Bring everyone in on decisions
  - Don't ever say "I" or "me"
- Trust
  - Trust your guys and they will trust in you
- Be organized
  - Expect and inspect
  - Be on time
- Set the pace
  - Bell every day
  - Top of 10-day
  - Schedule one on one meetings
  - Consistently meet with your leader

# Conference Etiquette

Be professional: It's your first impression on so many people

- Conduct – respect the hotel and guests, be early, take notes, participate
- Attire – represent yourself well
- Conversations – don't prejudge, don't ask about teams

Travel: Dress smart casual while traveling.

- You could meet a consultant while walking into the hotel

Meet and Greets

- Formal Attire all day
- Cocktail hour at night
- Don't dress like you're going to a club

Alcohol

- Control yourself
- It's fun to socialize, It's not fun to be kicked out
- Know your limit and don't come close to it

General Points

- Be on time for all sessions. You want a good seat don't you.
- Take notes, not only for yourself but for the new guy at the office
- Listen and learn how people are presenting, you want to be on stage one day right?