



Track: Customer Relationship Development

Unit 5: Launching the Customer Interaction and Making A Positive Impression

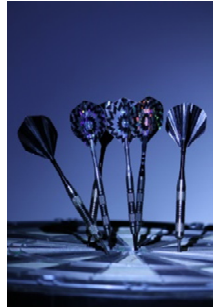
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LEARNING OBJECTIVES

By the conclusion of this session, participants will be able to:

- Identify at least three ways to make a positive first impression
- Make an impactful introduction to a prospect
- Recognize three things to do when approaching a prospect
- Define trust
- List the three C's of presence



Reflect on the following questions.

1. What is the first thing you notice about a person you are meeting for the first time?
2. Think about a time when someone made a negative first impression. What was it that made that negative impression?

Sabotaging Our First Impression:

- Sloppy or _____
- Using _____
- Knowing _____ about the customer's _____ and _____
- _____ the _____
- Poor _____
- _____
- Being _____

A PROFESSIONAL IMAGE

- Sends the right message about the _____ you place on preparation and that interaction
- Builds your _____
- _____ of what people infer about us comes from our non-verbal communication

Pay Attention to Your Non-Verbals

Unscramble the underlined words below to find out some things to do and not to do.

▪ Don't

- lpsmu
- Touch your eacf or rahi
- Look at the ngodru
- Tap your otof
- Stand with msra osrceds
- rnfow or lsocw

▪ Do

- Put some ncoueb into your epts
- Adjust your tttaeudi
- genrtasih your restopu
- emils
- Make eev ancottc
- alne in slightly

MAKE YOUR FIRST 10 WORDS COUNT



- Speak clearly and _____
- Begin your interaction with a _____ message
- Include the person's _____ in the first 10 to 12 words

Tune Into Others

- Make eye contact and smile
- Be _____ centered, rather than self centered
- Be appropriately _____

Topics to Avoid in Conversation

Take a few minutes and think about the topics that you should avoid when having conversation with a customer or a prospect. What topics might be inappropriate or create a negative impression? Capture your ideas below.

TOPICS TO AVOID



- R _____
- P _____ philosophies
- H _____ issues
- S _____
- The _____ of others
- A _____ and _____
- P _____

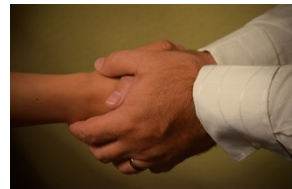
What Does Your Handshake Say About You?

Look at the pictures below. What do you think each handshake says about the person?

1



2



3



4



A Successful Handshake

- Keep the _____ together with the thumb up and open
- Slide your hand into the other person's so that each person's _____ of skin between thumb and forefingers touches the other's
- Squeeze _____, but not bone-crushing
- May be "pumped" once or twice from the _____
- _____ after the shake, even if the introduction continues

LOOKING PROFESSIONAL



- Keep your hair neat and in fashion
- Maintain good hygiene
- Keep shoes well maintained
- Wear appropriate workplace clothing

Grooming and Hygiene Checklist

Hair:

Clean

Trimmed/cut

Combed/styled

Facial Hair (Men):

Freshly shaved

Mustache or beard neatly groomed

Hair in nose and ears trimmed

Make-up (Women):

Natural looking (not evening out look)

Avoid bright lip colors

No glitter

Fingernails:

Neat, clean, and trimmed

Women: Avoid bright nail polish colors (fuchsia, orange, etc.; avoid chipped nails)

Teeth:

Brushed and fresh breath

Body:

Freshly bathed/showered

Use deodorant

Use perfume/cologne sparingly, if at all

LOOKING PROFESSIONAL

Men's Clothing/Appearance Checklist

General:

Clothes clean and well-pressed

No stains, tears or discoloration

No buttons missing or falling hems

Shirt:

Tucked in

Buttoned, may leave top button open

Pants:

Break in the front and fall straight from buttocks

Pockets remain flat, no bulging

Pleats remain closed

Socks and Shoes:

Shoes polished and cleaned

Always wear socks

Sock color blends with pants and shoes

Socks long enough to cover calf; no skin showing

Accessories:

No bracelets, chains, earrings, or fancy rings

Simple classic watch (no heavy sports watch or calculator watch)

Simple leather belt (no large belt buckles)

Belt color matches shoes

Belt in good condition

LOOKING PROFESSIONAL

Women's Clothing/Appearance Checklist

General:

- Clothes clean and well-pressed
- No stains, tears or discoloration
- No buttons missing or falling hems
- Avoid dark lingerie with light clothes

Shirt:

- Tucked in
- Buttoned, make sure buttons remain closed with at least 1" of fabric on side of bust line
- Neckline 2" above cleavage

Pants/Skirts:

- Fall straight from buttocks and don't curve under
- Pockets remain flat, no bulging
- Pleats remain closed
- No visible lines

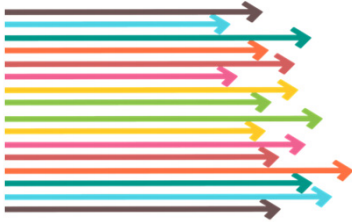
Hose and Shoes:

- Shoes polished and cleaned
- Keep heels in good condition (avoid too high or narrow heels)
- Natural color hose, same shade or lighter than shoes (no textured hosiery)
- No runs, snags or bagginess in hose

Accessories:

- Avoid noisy jewelry
- Simple leather belt (no large belt buckles)
- Belt color matches shoes
- Belt in good condition

WHEN YOU APPROACH THE CUSTOMER



- Make a good first _____ by using good _____ skills
- Have a plan for _____ with the customer
- State the _____ of the interaction to the customer
- Advance your personal _____ with the customer
- Find _____ and begin building rapport

Introducing Yourself and Your LDC to the Customer

- Consider including things like:
 - Your name and title
 - Your company's name
 - Length of time in the business
 - Industry accreditation or recognition
 - Specific experience working with others in your customer's niche or industry
 - Experience helping other customers with similar challenges
 - The outcomes you create for your customers

WHAT IS TRUST?

What Is Trust?

Create a one sentence definition of the word trust. Capture your definition below.



How to Build Trust

- **T**rack Record
 - Delivering on the promises made; repeated and consistent performance for the customer
- **R**esponsive
 - Timely feedback, sense of urgency, helpful to the customer in solving problems
- **U**nderstanding
 - Probing and clarifying, listening, being empathic, considering the situation from the customer's perspective
- **S**incere
 - Actions consistent with words; congruent
- **T**ruthful
 - Honest, non-manipulative, congruence in words and actions

To Improve The Trust in My Relationships, I Will:

-
-

WHAT IS PRESENCE?

- An _____, an _____, or a _____ that makes people want to _____ with you and _____ what you have to say.
- People with presence are able to _____ other _____
- Presence helps you to _____ and _____ a prospect to take _____

Think about someone you know that has great presence, and identify the elements that are responsible for their presence. What about them makes you feel like they have presence? Capture your ideas below.



The 3 C's of Presence

- _____
 - The power to inspire _____ or _____ in others
- _____
 - The ability to _____ with the prospect
- _____
 - A _____ in your own _____ or _____

IMPROVING MY PRESENCE

- **Credibility: The power to inspire belief or trust in others**
 - Use a reference
 - Share your unique qualifications or credentials
 - Make sure your words and actions are congruent
 - Follow through and do what you say you'll do
 - Be authentic
- **Connection: The ability to emotionally engage with the prospect**
 - Focus on the prospect, not yourself
 - Be in the moment and fully present
 - Be vulnerable and own if you make a mistake or don't know the answer to a question
- **Confidence: A belief in your own ability**
 - Believe that you provide value
 - Treat your prospect like they are your peer, not your superior
 - Be an expert and see yourself that way
 - Express passion around your beliefs and the value of your solution
 - Demonstrate power poses that exude confidence and also help to make you feel and act more confident
 - Project your voice



Homework Assignments:

- Review the checklists on pages 6-8 of your handout, and identify the things that you could do to enhance your image.
- Take time to think through how you will introduce yourself to prospects, so that you gain credibility and speak to the meaningful outcomes that you could create for them.
- Think about ways that you could enhance your presence with your prospects and customers, and begin focusing on them.