

Comprehensive Sales Training .

Customers can be classified into types such as loyal, new, potential, and at-risk, each requiring distinct engagement strategies to maximize value and satisfaction.

Types of Customers

Module 4



1. **Customer Segmentation**
2. **Identifying Customer Types**
3. **Tailoring Sales Approaches**
4. **Building Relationships with Different Customer Types**
5. **Case Studies and Examples**





Created by
ex-Procter & Gamble, Rothmans, BAT, Gillette, Nokia,
Microsoft & 3M managers.

UpskilPRO tools are designed in easy-to-use solutions, all you need to do is download the tool and get to work immediately. All UpskilPRO material has taken 100's of hours and many 1000's of \$ to build, all this expertise and content is brought to you for a fraction of the cost to help professionals enhance their capability.

core areas which are best suited to improve using our tools:

- Subject matter expertise
- Best practices
- Analytical output & charting
- Prioritization
- Process
- Training

Making life simpler for Sales & Marketing professionals.



Tools in one place to get 10X productive now.

Job Descriptions

Develop roles clearly and completely across varying levels of experience

Agreements

Draft your business agreements across a variety of areas

KPI's

Performance indicator, a quantifiable measure of performance over time versus a specific objective.

Strategic tools

These tools are recognised the world over in business schools, consulting firms and companies who plan strategically.

Scorecards

Designed as functional or subject indicators across a variety of situations to enable performance of situational evaluation versus aligned standards.

Assessments

Assessments are designed around specific areas to conduct reviews and will center around a benchmark reviewing individuals or functions

Research

Research tools for sales and marketing engagement

Checklists

Designed around achieving milestones in a sequential manner.

Calculators

calculate the right ratios for businesses looking for benchmarks in a variety of situations

Analytical Tools

Interactive excel tools on specific business areas based on your data inputs delivered in a workbook model with instructions.

Content Modules

Best practice material in power point for use as a knowledge base in business training , planning and execution .

Templates

Templates are designed based gather information in a structured manner





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Comprehensive Sales Training Plan

Module 10 Modules.

"The comprehensive sales training plan encompasses 10 essential modules, each covering critical areas of knowledge and expertise required by sales professionals in the early stages of their careers. These modules are meticulously designed to equip sales professionals with foundational skills and knowledge, preparing them for eventual specialization within their industry as the next stage of their professional development."



Comprehensive Sales Training Plan Module 4 - Types of Customers.

Comprehensive Sales Training Plan

Module 4 - Types of customers.

Summary

Understanding the types and importance of customers is crucial for any business. Different customer types, such as loyal, new, and potential customers, each offer unique value and require tailored engagement strategies.

Recognizing their significance helps businesses enhance satisfaction, foster loyalty, and drive growth.

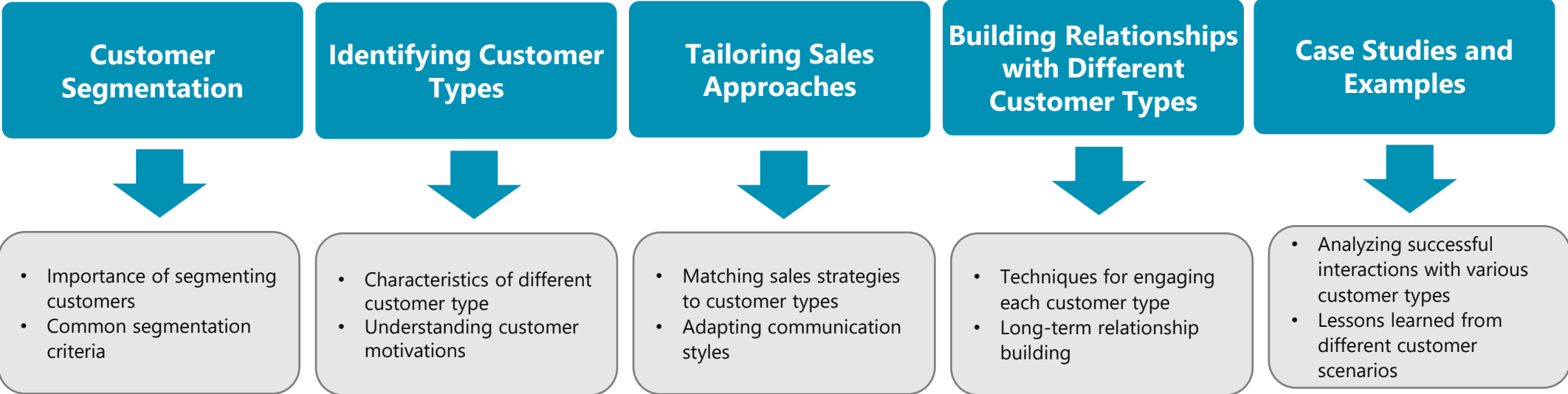


Comprehensive Sales Training Plan

Module 4 - Types of customers.

Objective:

Identify different customer types and tailor sales approaches to meet their unique needs.



Customer Segmentation

Importance of segmenting customers.

1. Enhancing Targeting Accuracy

1. **Objective:** Improve the precision of marketing and sales efforts.
2. **Key Points:**
 1. Allows for tailored marketing messages that resonate with specific customer groups.
 2. Increases the relevance of promotions and offers, leading to higher conversion rates.



Actions

1. Analyze customer data to identify distinct segments.
2. Develop targeted marketing campaigns for each segment.

2. Improving Customer Satisfaction

1. **Objective:** Enhance the customer experience by meeting specific needs and preferences.
2. **Key Points:**
 1. Customized interactions and offerings make customers feel valued and understood.
 2. Leads to higher satisfaction, loyalty, and repeat business.



Actions

1. Gather feedback from different segments to understand their needs.
2. Adapt products, services, and communications to meet these needs.

3. Increasing Efficiency in Resource Allocation

1. **Objective:** Optimize the use of marketing and sales resources.
2. **Key Points:**
 1. Focus resources on high-potential segments to maximize return on investment (ROI).
 2. Avoid wasting resources on low-value or uninterested segments.



Actions

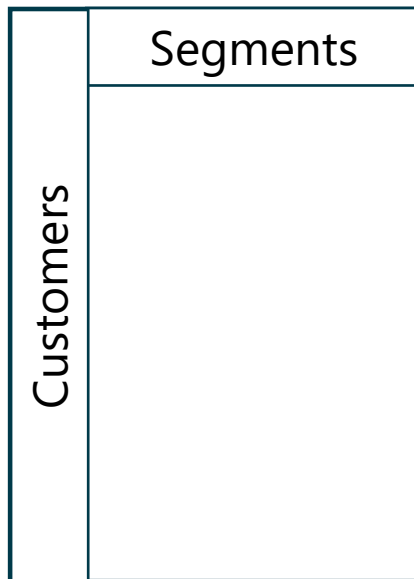
1. Conduct a cost-benefit analysis to determine the most lucrative segments.
2. Allocate budget and resources based on segment potential and performance.

Customer Segmentation

Importance of segmenting customers.

Actions

1. Analyze customer data to identify distinct segments.
2. Develop targeted marketing campaigns for each segment.



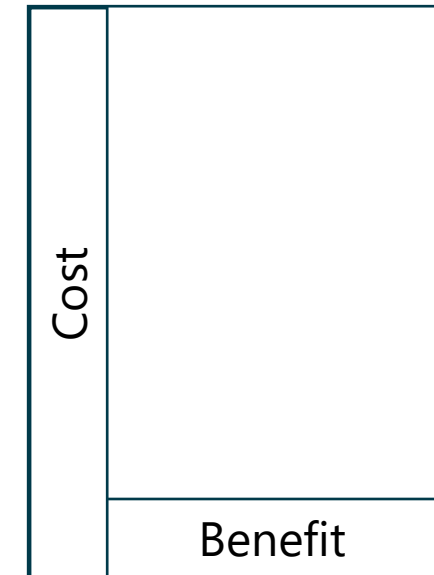
Actions

1. Gather feedback from different segments to understand their needs.
2. Adapt products, services, and communications to meet these needs.



Actions

1. Conduct a cost-benefit analysis to determine the most lucrative segments.
2. Allocate budget and resources based on segment potential and performance.



Customer Segmentation

Common Segmentation Criteria.

1. Demographic Segmentation

1. **Objective:** Categorize customers based on demographic factors.
2. **Key Points:**
 1. Demographic factors include age, gender, income, education, occupation, and family size.
 2. Helps in understanding the basic characteristics of different customer groups.



Actions:

1. Collect demographic data through surveys, registration forms, and customer databases.
2. Analyze the data to identify distinct demographic segments.

2. Psychographic Segmentation

1. **Objective:** Group customers based on their psychological traits and lifestyle.
2. **Key Points:**
 1. Factors include lifestyle, values, personality traits, interests, and opinions.
 2. Provides deeper insights into customers' motivations and preferences.



Actions:

1. Conduct market research and customer surveys to gather psychographic information.
2. Use this information to create detailed customer profiles and personas.

3. Behavioural Segmentation

1. **Objective:** Segment customers based on their behaviour and interactions with the brand.
2. **Key Points:**
 1. Includes purchasing behaviour, usage rate, brand loyalty, and decision-making process.
 2. Helps in understanding how customers engage with products and services.



Actions:

1. Track customer behaviour through analytics tools, purchase history, and loyalty programs.
2. Identify patterns and trends to segment customers based on their behaviour.

Customer Segmentation

Common Segmentation Criteria.

Actions:

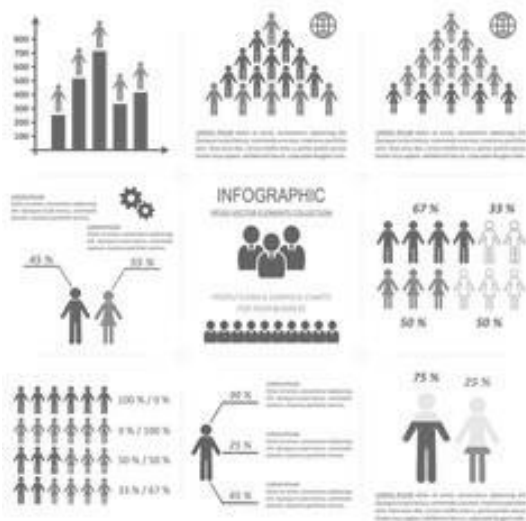
1. Collect demographic data through surveys, registration forms, and customer databases.
2. Analyze the data to identify distinct demographic segments.

Actions:

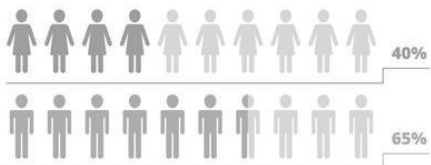
1. Conduct market research and customer surveys to gather psychographic information.
2. Use this information to create detailed customer profiles and personas.


Actions:

1. Track customer behaviour through analytics tools, purchase history, and loyalty programs.
2. Identify patterns and trends to segment customers based on their behaviour.



DEMOGRAPHY





Evelyn
Account Executive

“Getting back to nature helps me recharge after a long week.”

Demographics

- Los Angeles, CA, USA
- 24 Years Old
- Single

About

Evelyn is an account executive from Los Angeles, California. She's a recent college graduate who found a rewarding career in the nonprofit sector. She is actively involved in her community, considers herself a foodie, and loves going to the park with her dog "Bella."

Goals

- Spend more time outdoors
- Make time for friends
- Volunteer with local community organizations
- Practice mindfulness

Frustrations

- Limited parks within walking distance
- Los Angeles traffic
- Expensive dining options
- Did I mention, LA traffic ;)

Social Profile

Twitter: [Progress bar]

Facebook: [Progress bar]

Instagram: [Progress bar]

LinkedIn: [Progress bar]

Favorite Brands

patagonia, REI, Target



Consumer behavior



Purchasing habits



Consumer motivation

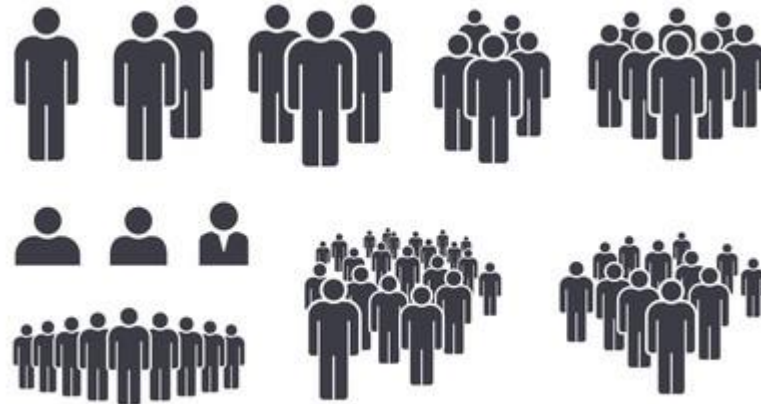
Customer Segmentation

Summation.

Common segmentation criteria for customers include demographic factors (such as age, gender, income, and education), psychographic factors (like lifestyle, values, and personality traits), and behavioural factors (such as purchasing behaviour, usage rate, and brand loyalty).

Customers can
be individuals

Customers can
be businesses

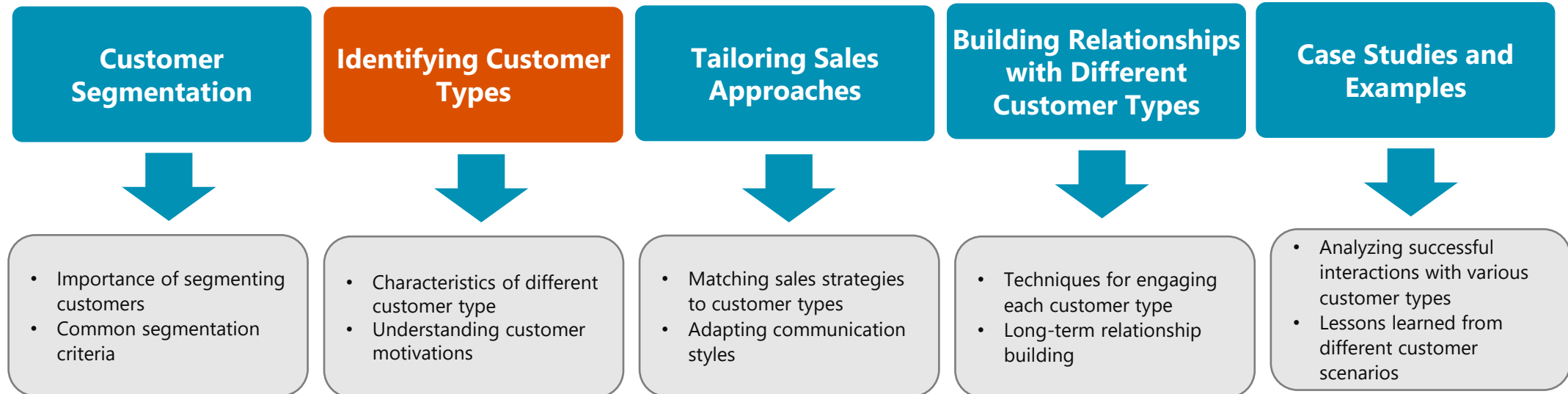


Comprehensive Sales Training Plan

Module 4 - Types of customers.

Objective:

Identify different customer types and tailor sales approaches to meet their unique needs.



Identifying Customer Types

Characteristics of Different Customers.

1. Analytical Customers

1. **Objective:** Understand the traits and preferences of analytical customers.
2. **Key Points:**
 1. Characteristics: Detail-oriented, data-driven, cautious decision-makers.
 2. Preferences: Require comprehensive information, evidence, and logical reasoning.
3. **Actions:**
 1. Provide detailed data, reports, and case studies to support your claims.
 2. Be patient and give them time to analyze and process information.



2. Amiable Customers

1. **Objective:** Identify and cater to the needs of amiable customers.
2. **Key Points:**
 1. Characteristics: Relationship-focused, cooperative, value trust and rapport.
 2. Preferences: Appreciate personalized service, empathy, and a supportive approach.
3. **Actions:**
 1. Build strong rapport by showing genuine interest in their needs and concerns.
 2. Focus on building long-term relationships and providing reliable support.



Identifying Customer Types

Characteristics of Different Customers.

3. Driver Customers

1. **Objective:** Recognize and respond to the traits of driver customers.
2. **Key Points:**
 1. Characteristics: Results-oriented, decisive, assertive, prefer quick and efficient solutions.
 2. Preferences: Value efficiency, direct communication, and quick results.



Actions:

1. Be concise and focused, emphasizing the benefits and outcomes of your product or service.
2. Respect their time and provide clear, actionable information.

4. Expressive Customers

1. **Objective:** Understand the characteristics and preferences of expressive customers.
2. **Key Points:**
 1. Characteristics: Enthusiastic, visionary, value innovation and creativity.
 2. Preferences: Enjoy dynamic discussions, new ideas, and innovative solutions.



Actions:

1. Engage them with enthusiastic and creative presentations.
2. Highlight the innovative aspects and future potential of your product or service.

Identifying Customer Types

Understanding Customer Motivations.

1. Identifying Key Motivations

1. **Objective:** Determine what drives each customer type to make purchasing decisions.
2. **Key Points:**
 1. Analytical: Seek detailed information and evidence of product efficacy.
 2. Amiable: Prioritize relationships, trust, and product reliability.
 3. Driver: Focus on achieving goals, efficiency, and return on investment.
 4. Expressive: Motivated by trends, innovation, and unique experiences.



Actions

1. Conduct customer interviews and surveys to understand their motivations.
2. Observe customer behaviour and interactions to identify key motivators.

2. Aligning Sales Strategies with Motivations

1. **Objective:** Tailor sales approaches to align with the specific motivations of each customer type.
2. **Key Points:**
 1. Analytical: Provide in-depth data and thorough explanations.
 2. Amiable: Focus on building rapport and ensuring reliability.
 3. Driver: Highlight quick results and efficiency.
 4. Expressive: Emphasize innovation and unique benefits.



Actions

1. Develop customized sales presentations and materials for each customer type.
2. Train sales teams to recognize and adapt to different customer motivations.

Identifying Customer Types

Understanding Customer Motivations.

3. Addressing Customer Concerns

1. **Objective:** Effectively address concerns based on customer motivations.
2. **Key Points:**
 1. Analytical: Address any data gaps or uncertainties with detailed information.
 2. Amiable: Reassure them with testimonials and strong customer support.
 3. Driver: Overcome objections by demonstrating quick benefits and ROI.
 4. Expressive: Address concerns by showcasing innovative features and future potential.



Actions

1. Prepare objection-handling strategies tailored to each customer type.
2. Use customer feedback to continuously improve understanding of motivations and concerns.

4. Personalizing Communication Styles

1. **Objective:** Adapt communication styles to resonate with each customer type.
2. **Key Points:**
 1. Analytical: Use precise language, provide data and facts, be patient.
 2. Amiable: Be friendly, listen actively, show empathy and understanding.
 3. Driver: Be concise, stay focused on objectives, avoid small talk.
 4. Expressive: Be enthusiastic, share ideas, engage in dynamic discussions.



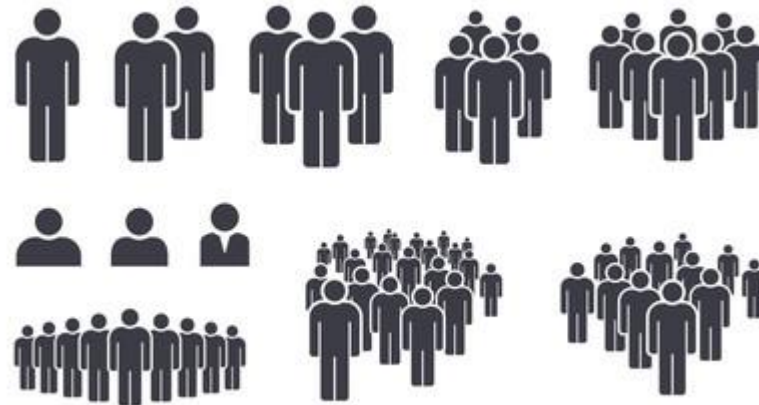
Actions

1. Train sales teams in effective communication techniques for each customer type.
2. Monitor and adjust communication strategies based on customer feedback and interactions.

Identifying Customer Types

Summation.

By following these stages, sales professionals can effectively identify different customer types and understand their motivations, allowing them to tailor their sales approaches to meet the unique needs and preferences of each customer group.

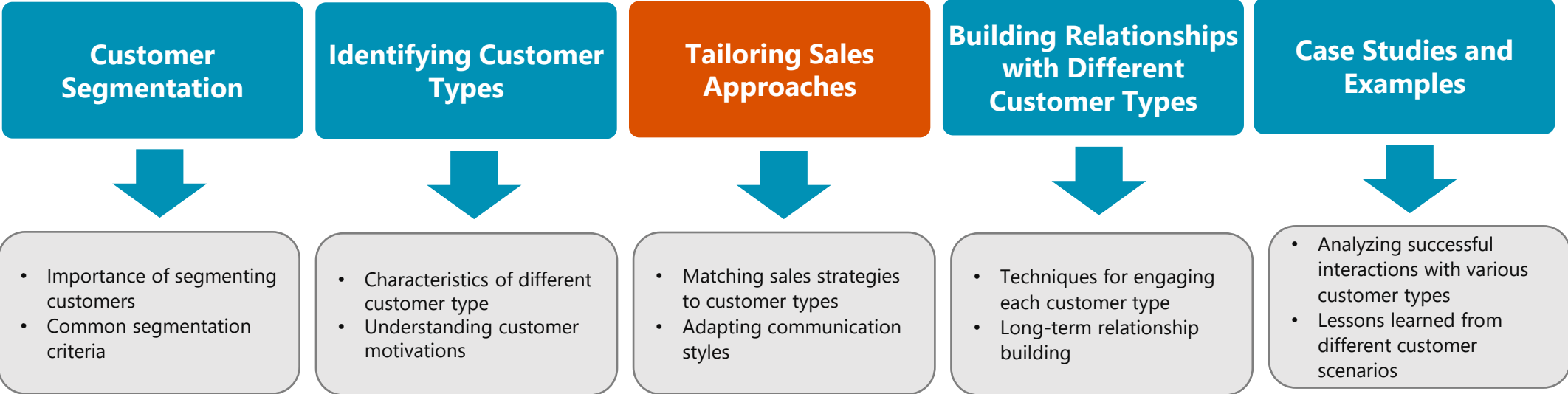


Comprehensive Sales Training Plan

Module 4 - Types of customers.

Objective:

Identify different customer types and tailor sales approaches to meet their unique needs.



Tailoring Sales Approaches

Matching Sales Strategies to customer types.

Objective: Develop and implement sales strategies that align with the characteristics and motivations of different customer types and adapt communication styles to enhance effectiveness.

1. Analytical Customers

1. **Objective:** Develop a sales strategy that caters to the detail-oriented and data-driven nature of analytical customers.
2. **Key Points:**
 1. Focus on providing detailed information, data, and logical reasoning.
 2. Highlight the product's features, benefits, and performance metrics.

2. Amiable Customers

1. **Objective:** Create a sales approach that builds trust and fosters strong relationships with amiable customers.
2. **Key Points:**
 1. Emphasize the importance of trust, reliability, and long-term support.
 2. Focus on the personal benefits and how the product or service will enhance their lives.



Actions

1. Prepare comprehensive reports, case studies, and comparisons.
2. Use charts, graphs, and statistics to support your claims.
3. Offer product demonstrations and free trials to allow for thorough evaluation.



Actions

1. Share testimonials and success stories from satisfied customers.
2. Offer personalized service and follow-ups to build rapport.
3. Highlight the customer support and after-sales service available.

Tailoring Sales Approaches

Matching Sales Strategies to customer types.

3. Driver Customers

1. **Objective:** Tailor the sales strategy to meet the goal-oriented and decisive nature of driver customers.
2. **Key Points:**
 1. Be concise, direct, and focused on results.
 2. Emphasize efficiency, quick benefits, and return on investment (ROI).



Actions:

1. Provide clear, actionable information and quick summaries.
2. Highlight the time-saving features and immediate benefits of the product.
3. Use case studies that demonstrate rapid success and ROI.

4. Expressive Customers

1. **Objective:** Develop a sales approach that resonates with the enthusiastic and visionary nature of expressive customers.
2. **Key Points:**
 1. Engage them with dynamic presentations and innovative ideas.
 2. Highlight the unique and creative aspects of the product or service.



Actions:

1. Use engaging and visually appealing presentations.
2. Share success stories that highlight innovation and unique applications.
3. Encourage participation and input from the customer to make the conversation lively.

Tailoring Sales Approaches

Adapting Communication Styles.

1. Analytical Customers

1. **Objective:** Communicate effectively with customers who prefer detailed and relevant information.
2. **Key Points:**
 1. Use precise language and avoid emotional appeals.
 2. Provide thorough explanations and logical reasoning.



Actions:

1. Present data and evidence to support your points.
2. Answer questions comprehensively and patiently.
3. Avoid pressure tactics; give them time to analyze and decide.

2. Amiable Customers

1. **Objective:** Adapt communication to be friendly and empathetic to build strong connections with amiable customers.
2. **Key Points:**
 1. Show genuine interest in their needs and concerns.
 2. Use a warm and friendly tone.



Actions:

1. Listen actively and show empathy.
2. Share personal stories and experiences to build rapport.
3. Focus on collaborative and supportive language.

Tailoring Sales Approaches

Adapting Communication Styles.

3. Driver Customers

1. **Objective:** Communicate efficiently and directly with goal-oriented and decisive customers.
2. **Key Points:**
 1. Be concise and to the point.
 2. Use assertive and confident language.



Actions:

1. Provide quick summaries and actionable information.
2. Avoid small talk and stay focused on the objectives.
3. Highlight the competitive advantages and results.

4. Expressive Customers

1. **Objective:** Engage expressive customers with enthusiastic and creative communication.
2. **Key Points:**
 1. Use lively and dynamic language.
 2. Encourage interaction and idea-sharing.



Actions:

1. Use visual aids and storytelling to make the presentation engaging.
2. Show enthusiasm and energy in your communication.
3. Encourage feedback and participation in discussions.

Tailoring Sales Approaches

Summation

By following these stages, sales professionals can effectively match their sales strategies to the characteristics of different customer types and adapt their communication styles to resonate with each group, leading to more successful and personalized sales interactions.



B2B
marketing



Sales
representative



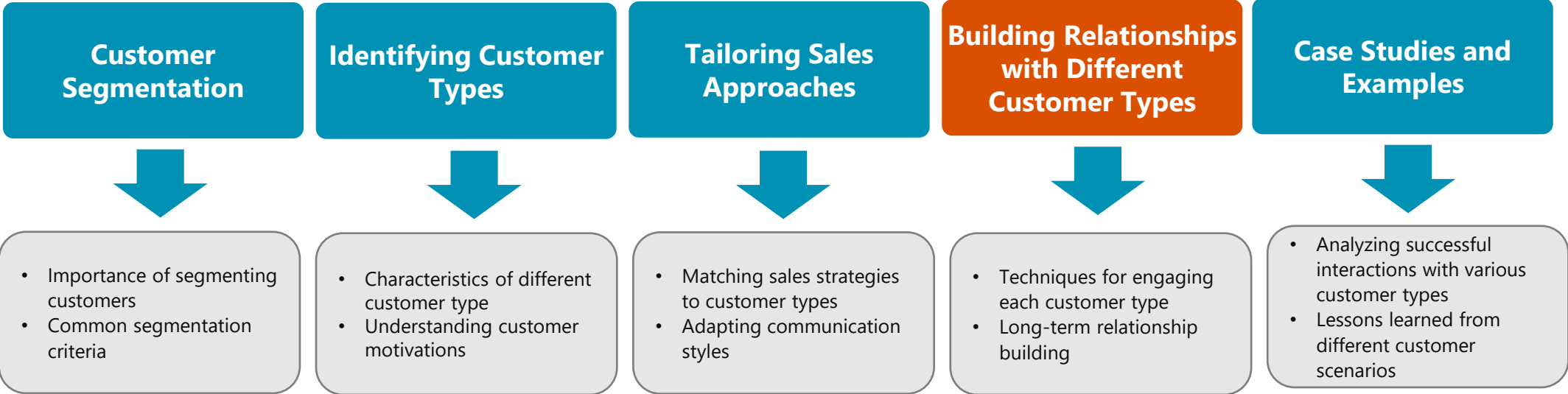
Personalized
selling

Comprehensive Sales Training Plan

Module 4 - Types of customers.

Objective:

Identify different customer types and tailor sales approaches to meet their unique needs.



Building Relationships

Techniques for Customer engagement

Objective: Develop techniques for engaging various customer types effectively and build long-term relationships that drive customer loyalty and repeat business.

1. Analytical Customers

- Objective:** Establish trust and credibility by addressing the detailed and data-driven needs of analytical customers.
- Key Points:**
 - Provide detailed and accurate information.
 - Be patient and thorough in your explanations.



Actions:

- Share comprehensive reports, case studies, and factual data.
- Offer product demonstrations and trials to allow for careful evaluation.
- Follow up with additional information and answer any questions meticulously.

2. Amiable Customers

- Objective:** Build a strong personal connection and foster trust with amiable customers.
- Key Points:**
 - Show empathy and understanding.
 - Focus on personal interactions and support.



Actions:

- Engage in active listening and validate their concerns.
- Share personal stories and experiences to build rapport.
- Provide consistent follow-up and check-ins to show you care about their satisfaction.

Building Relationships

Techniques for Customer engagement

3. Driver Customers

1. **Objective:** Engage driver customers by focusing on efficiency, results, and decisiveness.
2. **Key Points:**
 1. Be direct and focused on outcomes.
 2. Respect their time and need for quick decisions.



Actions:

1. Highlight quick wins and immediate benefits of your product or service.
2. Provide clear, concise, and actionable information.
3. Follow up with performance metrics and results to demonstrate success.

4. Expressive Customers

1. **Objective:** Capture the interest and enthusiasm of expressive customers with dynamic and engaging interactions.
2. **Key Points:**
 1. Use creative and innovative approaches.
 2. Encourage interaction and idea-sharing.



Actions:

1. Use visual aids, stories, and dynamic presentations to engage them.
2. Show enthusiasm and energy in all communications.
3. Encourage their input and ideas to make them feel involved.

Building Relationships

Long term relationship building

1. Analytical Customers

1. **Objective:** Maintain long-term relationships by consistently providing value and reliability.
2. **Key Points:**
 1. Continuously offer valuable data and insights.
 2. Ensure product or service reliability and performance.



Actions:

1. Send regular updates and reports to keep them informed.
2. Provide ongoing training and support to maximize product usage.
3. Schedule periodic reviews to discuss performance and areas for improvement.

2. Amiable Customers

1. **Objective:** Foster long-term relationships by consistently showing care and support.
2. **Key Points:**
 1. Maintain personal and empathetic interactions.
 2. Ensure consistent and reliable support.



Actions:

1. Regularly check in to see how they are doing and address any concerns.
2. Send personalized messages and gestures of appreciation.
3. Invite them to customer appreciation events and loyalty programs.

Building Relationships

Long term relationship building

3. Driver Customers

1. **Objective:** Strengthen long-term relationships by continuously delivering results and efficiency.
2. **Key Points:**
 1. Focus on ongoing performance and ROI.
 2. Keep interactions efficient and result-oriented.



Actions:

1. Provide regular performance updates and success metrics.
2. Introduce new features or services that can enhance their efficiency.
3. Offer exclusive access to advanced solutions and beta programs.

4. Expressive Customers

1. **Objective:** Maintain long-term relationships by fostering innovation and engagement.
2. **Key Points:**
 1. Keep interactions lively and creative.
 2. Encourage their input and participation in new initiatives.



Actions:

1. Regularly introduce new and innovative features or services.
2. Host interactive webinars, workshops, and events to keep them engaged.
3. Create a platform for them to share their ideas and feedback.

Building Relationships

Summary

By following these stages, sales professionals can effectively engage with different customer types and build long-term relationships that drive customer satisfaction, loyalty, and repeat business.

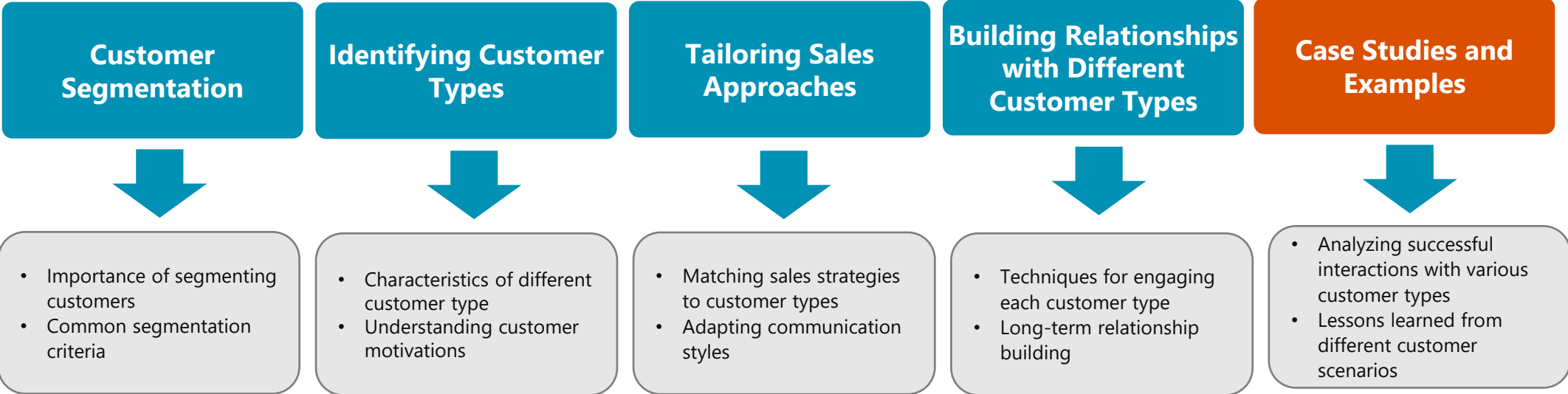


Comprehensive Sales Training Plan

Module 4 - Types of customers.

Objective:

Identify different customer types and tailor sales approaches to meet their unique needs.



Case Studies & Examples

Analysing Interactions with various customer types

Objective: Learn from real-world examples by analyzing successful interactions with various customer types and extracting valuable lessons to improve future sales strategies.

1. Selecting Relevant Case Studies

- Objective:** Choose case studies that are representative of interactions with different customer types.
- Key Points:**
 - Relevance: Ensure the case studies cover interactions with analytical, amiable, driver, and expressive customers.
 - Variety: Include a mix of industries, product types, and sales scenarios.

2. Detailed Analysis of Each Case Study

- Objective:** Conduct an in-depth analysis of each selected case study to understand the strategies used.
- Key Points:**
 - Customer Profile: Identify the type of customer and their characteristics.
 - Sales Approach: Examine the sales strategies and techniques employed.
 - Outcome: Analyze the results and customer feedback.



Actions:

- Collect case studies from various sales teams and customer segments.
- Categorize the case studies based on customer types and sales outcomes.
- Select case studies that provide clear examples of successful engagements and outcomes.



Actions:

- Create a template to capture detailed information about each case study.
- Interview the sales professionals involved to gain deeper insights.
- Document the customer's initial objections, the approach taken, and the final outcome.

Case Studies & Examples

Analysing Interactions with various customer types

3. Identifying Key Success Factors

•**Objective:** Determine the critical factors that contributed to the success of each interaction.

•**Key Points:**

- Strategies: Identify which sales strategies were most effective.
- Techniques: Note specific techniques that resonated with the customer.
- Communication: Highlight the communication styles that were used.



•**Actions:**

- List the key factors that led to successful outcomes in each case study.
- Look for common patterns and unique approaches.
- Summarize the critical success factors for each customer type.

Lesson Plan:

1. **Customer S**
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2. **Identifying**
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3. **Tailoring S**
 - Match
 - Adap
4. **Building Re**
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 - Long-
5. **Case Studie**
 - Analy
 - Lesso

Case Studies & Examples

Lessons learned from Different Customer scenarios

1.Extracting Practical Lessons

1. **Objective:** Derive practical lessons from the analysed case studies to apply in future sales interactions.
2. **Key Points:**
 1. Adaptability: Understand the importance of adapting sales approaches to different customer types.
 2. Techniques: Learn which techniques are most effective for each customer type.
 3. Communication: Recognize the impact of tailored communication styles.



Actions:

1. Create a summary of lessons learned from each case study.
2. Develop guidelines and best practices based on these lessons.
3. Share the lessons with the sales team through training sessions and workshops.

2.Developing Best Practices

1. **Objective:** Formulate best practices for engaging with different customer types based on the lessons learned.
2. **Key Points:**
 1. Standardization: Develop standardized approaches that can be adapted to individual customer needs.
 2. Flexibility: Ensure the practices allow for flexibility and customization.
 3. Continuous Improvement: Encourage ongoing learning and adaptation of practices.



Actions:

1. Compile a set of best practices for handling each customer type.
2. Integrate these practices into sales training programs and materials.
3. Review and update the best practices regularly based on new insights and feedback.

Case Studies & Examples

Lessons learned from Different Customer scenarios

3. Implementing Lessons in Sales Strategies

1. **Objective:** Incorporate the lessons learned into everyday sales strategies to enhance effectiveness.
2. **Key Points:**
 1. Consistency: Apply the best practices consistently across the sales team.
 2. Training: Ensure all sales professionals are trained on the new practices.
 3. Monitoring: Track the implementation and effectiveness of the new strategies.



Actions:

1. Train the sales team on the new best practices and guidelines.
2. Monitor sales interactions to ensure the practices are being applied.
3. Gather feedback from the sales team and customers to assess the impact.

4. Continuous Learning and Adaptation

1. **Objective:** Foster a culture of continuous learning and adaptation to keep improving sales strategies.
2. **Key Points:**
 1. Feedback Loop: Establish a feedback loop to gather insights from ongoing sales interactions.
 2. Adaptation: Be open to modifying practices based on new data and experiences.
 3. Innovation: Encourage innovation in sales approaches and techniques.



Actions:

1. Regularly review and analyze new sales interactions for additional insights.
2. Update the best practices and training materials based on feedback and new case studies.
3. Promote a culture of sharing successful strategies and learning from each other's experiences.

Case Studies & Examples

Summation

By following these stages, sales professionals can leverage case studies and real-world examples to refine their strategies, improve their interactions with different customer types, and ultimately achieve better sales outcomes.



QUIZ # 15043 Types of customers



Please take the quiz on types of customers to complete your learning and certification on this module, Search on upskilPRO.com using 15043 to take the quiz

Comprehensive Sales Training .

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Types of Customers

Module 4



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