Facilitator Guide Sample

This is a brief example from a facilitator guide that outlines the lessons to be covered in a 14-day sales agent VILT program. This small sample includes some of the pages that help illustrate the feel and flow of the training content in a larger document.

August 2021	Sales Training

Contents

Week Before Training Prep

Tasks

- Review all areas of the Resource Center that affect training - Ownership Guidelines, etc.
- Update the Participant Guide with any changes.
- Update the Facilitator Guide with any changes.
- Update the assessment if needed and add to LMS.
- Verify with the Call Center if there are any scripting or process changes.
- Add updated docs to the Resource Center.
- Obtain names of attendees and their email address.
- Virtual training – send WebEx, Zoom, or Teams invite to all (vendor dependent).
- Add all reps to the Resource Center – Read Only views. This will send them an email invite with the link.
- Invite all reps as Read Only to the Teams SharePoint - this should be completed for the Trainer.
- Link will be sent in email invite.
- Create specific folder where they will access all resources needed.

Learning Path Overview

	Topics
DAY 1	**Scope of Campaign** **Background of Training** **Basics**
DAY 2	**Daily Review** **SharePoint Resource Scavenger Hunt** **Plan Designs – Maximizing Member Benefits** **Other Plans**
DAY 3	**Daily Review** **Basics and Product Offering Assessment** **Call Handling Process – Outside of Sales Processes**
DAY 4	**Daily Review** **Application Process** **Practice – Completing Applications** **Combine Scripting with Applications**
DAY 5	**Daily Review** **Handling Objections** **Product Positioning Podcast & Worksheet** **Plan Presentation**
DAY 6	**Daily Review** **Full Sale Simulation**
DAY 7	**Daily Review** **Performing your Role** **Full Sale Simulation Role-Play**
DAY 8	**Daily Review** **Written Assessment** **Verbal Assessment**

Overview and Purpose

This training will prepare the Participants to fill the needs of these types of customers:
- Anyone who is shopping for individual and family insurance plans within the market area in their state.
- Those who may need coverage for pre-existing conditions.
- Anyone who may meet income requirements to receive financial assistance with their premiums.

The learning experience provides a way for the Participants to learn, practice, and apply skills through a combination of:
- Virtual instructor-led training
- On-demand, self-study lessons and activities
- Role-play practice
- Simulations

Training Goal

Upon completion of this training Participants will be able to:
- Perform the operations of sales.
- Successfully operate the phone software application.
- Assist inbound customers with questions concerning their insurance needs.
- Make outbound calls to customers who need to complete applications.
- Successfully operate the customer database and application systems.
- Assist customers with the enrollment processes.

Participant Expectations

- Participants are expected to complete all scheduled training activities.
- Participants will complete all training activities in sequential order to maximize learning, retention, and ability to execute upon completion of training.
- Participants will use a **Participant Guide** which you will direct them to, to assist them as they complete lessons and activities. The Participant Guide is in an editable PDF format. Participants must download the file to their personal computer so they can make and save changes as directed during activities.
- Participants will also use a **Participant Systems and Tools Guide** which you will direct them to found on the SharePoint page.
- Participants will access eLearnings and assessments on the **LMS**. You will provide all Participants with the path, links and/or the unique course codes to access each document or file in the LMS.
- Participants also will participate in other training activities as directed by the training team during virtual, instructor-led teleconference training sessions you facilitate.

Participant On-Demand Training

You will find the activities for on-demand learning located in the LMS and SharePoint page and folders with further instruction provided below. Please pay close attention to the instruction, associated worksheets, and resources located in this guide for each activity.

- **Resources** will be located on SharePoint page

- **On-demand learnings** (both SharePoint and LMS) will be located in the Training > On-demand Activities folder > On-demand Links referenced throughout as *On-demand Links spreadsheet*

On-Demand, Self-Study Activities

- On-demand, self-study activity resources may include:
    - Audio recordings
    - Slide activities
    - Assessments
- Participants may use the sales agent's quoting, sales record systems and the marketplace websites during some self-study activities.
- They may also find the documents found in the SharePoint page, which you will demonstrate for them before needed.

Partner and Triad Activities

- Some lessons contain partner and triad activities. You will assign a partner or triad group right before the activity.

- Participants may use the sales agent phone system to call each other and teleconferencing breakout rooms to virtually meet with partners or triads to do these activities.
- They may also use the sales agent's quoting, sales record systems and the marketplace websites during some of these activities.

e-Learning Lessons and Assessments

- Participants will complete eLearning lessons and assessments found in the LMS.
- They may use provided reference materials such as state brochures while completing assessments.
- They may also use during all assessments, any resources available to them, including a copy of their Participant Guide (downloaded to their personal computer), and their notes.

Your Role

Your role as Trainer is to facilitate maximum Participant learning. You will do this by:

- Thoroughly reviewing this Facilitator Guide to become familiar with the content and format of the training.
- Completing all preparation steps described in this guide, including scheduling and communication.

You should expect to:

- Communicate to Participants information they need to successfully complete the training.
- Receive communication from Participants about assistance they might need or questions they have.

Important Note: *Trainer should be available using an agreed upon communication tool, to support Participants if they have questions throughout the process of completing on-demand activities.*

Logistics

For Virtual Instructor-Led Training:

- Ensure you have a fully charged battery on your laptop or are plugged in for power.
- Ensure that your sound is turned on.
- Limit use of other devices on networks to ensure audio and video components can fully function.
- Ensure your camera is working and turned on for the session.
- Ensure you are using the most recent version of the teleconference tool.

DAY 1

Overview

Welcome!

Day 1 is the kickoff to the training. You will find an outline here of the topics covered on Day 1:

- Scope of Campaign
- Company Background
- Basics Modules

Participants will experience Virtual Instructor-Led Training (VILT) (led by you) as well as interact with you, and complete on-demand activities independently. The topics above are broken down as follows:

- Scope of Campaign (VILT)
- Company Background (On-Demand)
- Company Background Recap (VILT)
- Basics Modules (On-Demand)

As you facilitate your sessions and support Participants in their on-demand activities, you will want to have open and available the Participant Guide and Participant Systems and Tools Guide.

Welcome and Introduction to the Training

Estimated Time	1 hour

What You Need to Know

- Trainer should use Day 1 VILT Slides located on the Shared Teams Day 1 folder for the Welcome section when training the live, virtual instructor-led training.
- Reference Trainer facilitation notes directly in the slide notes for talking points as you review each slide.
- Review:
    - Introductions
    - Welcome and Ground Rules slides.
    - Teleconference Technology slides

Scope of Campaign

Estimated Time	30 minutes

Our Goals

- Goal 1
- Goal 2
- Goal 3

Important Note for Trainer: Have the Participant Guide open for reference.

What You Need to Know

- Trainer should use Day 1 VILT Slides located on the Shared Teams Day 1 folder for the Scope of Campaign to conduct the live, virtual instructor-led training.
- Reference Trainer facilitation notes directly in the slide notes for talking points as you review each slide.
- Review Scope of Campaign section.

What You Will Be Teaching

You will be teaching the following topics:

- About the Campaign:…
- Overview:…
- Your Role as an Agent:…

After Welcome and Scope of Campaign, you will direct Participants to complete:

- Downloading a copy of the Participant Guide to their personal computer before proceeding. (If haven't done so yet, have them all download it now.)
- Company Background On-Demand work as outlined in their Participant Guide (listed below), before joining you in the next Virtual Instructor-Led Training Session: Company Background.

Important Note: Make sure to monitor the chat window in the teleconference session. Participants will be asked to type questions they have for the Trainer in the chat box at any time.

Company Background

Estimated Time	1 hour 30 minutes

On-Demand Lessons Prior to the VILT Session

Participants should have completed the following lessons prior to attending the Company Background VILT:

- Learning 101 eLearning (access via On-demand Links spreadsheet)
- Direct Sales Flow of Business eLearning (access via On-demand Links spreadsheet)
- Direct Sales Roles and Responsibilities eLearning (access via On-demand Links spreadsheet)
- On-Demand Activity 1: Systems Accesses (in the Participant Guide)
- On-Demand Activity 2: About Company (in the Participant Guide)
- On-Demand Activity 3: Company C-trip (access via On-demand Links spreadsheet)

What You Need to Know

- Trainer should use the same Day 1 VILT Deck, accessed via Shared Teams > Design and Develop > Day 1 Folder for Company Background to conduct the live, virtual instructor-led training.
- Reference Trainer facilitation notes directly in the slide notes for talking points as you review each slide.
- Review Background and Closing sections.

Important Note: *Trainer should be available using an agreed upon communication tool, to support Participants if they have questions throughout the process of completing on-demand activities.*

What You Will Be Teaching

You will be teaching the following topics:

- **About ABC:** ABC is a company uniquely qualified to provide a broad array of choices for almost any individual, family, budget, or situation.
- **Culture Values:** Compassion, Trust, Relationships, Integrity, and Performance
- **Flow of Business:** Understand how departments work together.
- **Agency Sales Overview:** Understand the role of agency sales department and how they work with other departments.
- **Teams Roles and Responsibilities**: Overview of responsibilities assigned to various teams. Lead Ownership Guidelines
- **Expectations and Policies:** How a Sales Agent should conduct themselves regarding Email, Phone and Food.
- **Resource Center:** How to access and use the Resource Center.
- **Systems Access** (Jabber, LMS): How to access and use Jabber and LMS.

SharePoint Teams Page

Estimated Time	30 minutes

Access the Teams Page when to demonstrate how to access and use it as you review the needed files and information with the Participants.

Explain to Participants that these documents can be updated at any time, so they should become familiar with how to access this site and be comfortable using it.

Warn Participants that if they save a copy of any of these files on their personal computer, they should check for updates to those files frequently.

Closing – Questions and What's Next

Estimated Time	15 minutes

What You Need to Know

- Trainer should use Day 1 VILT Deck Slides, accessed via Shared Teams > Design and Develop > Day 1 Folder for the Closing to conduct the live, virtual instructor-led training.
- Reference Trainer facilitation notes directly in the slide notes for talking points as you review each slide.
- Allow time for Participants to ask questions from their on-demand activity work and from session overview.

Basics – On-Demand Learning

Estimated Time	2 – 3 hours, rest of the day

What You Need to Know

Participants will:

- Use instructions and links in their Participant Guide to view the modules.
- As they complete each module, they will complete the module Q&A worksheet, found in their Participant Guide.
- Detailed Basics information is in the Participant Guide for future reference.

Modules

- Ask all Participants if they have downloaded a copy of the Participant Guide from SharePoint folder.
- Have Participants open their personal copy of the Participant Guide from their computer.
- Provide instructions above for completing the module worksheets.
- Before closing, review information needed for next virtual instructor-led session.

DAY 2

Overview

Welcome!

You will find an outline here of the topics covered on Day 2:

- Topic 1
- Topic 2

Participants will experience Virtual Instructor-Led Training (VILT) (led by you) as well as interact with you, and complete on-demand activities independently. The topics above are broken down as follows:

- Topic 1
- Topic 2
- Topic 3