



# GREAT money talk – how to be confident discussing money with customers

*An interactive half-day, face-to-face workshop or 90-minute virtual session*

## Overview

They say that money talks, but we often don't like to talk about money! Money conversations with customers can feel uncomfortable whether you are talking about price in a sale or compensation in a complaint. This session will help your people to be comfortable and confident having money conversations with customers.

## How will it help?

This workshop will help your people to:

- Demonstrate confidence in the value of their solution and why it is right for their customers
- Show customers that we are on their side, whilst also balancing the commercial needs of the organisation
- Have frank, honest and open discussions about money if the customer has concerns

## Who should attend?

Anyone in a customer-facing role who has attended the GREAT customer service workshop.

## What happens in it?

A highly interactive and practical session, using real scenarios relevant to your people in their role. Your people will learn three key strategies that will help them to be more confident discussing discounts and compensation with customers and have the opportunity to practise the strategies in the context of their everyday customer interactions.

## How's it delivered?

### Option 1 – Face-to-face

A half-day session for a group of up to 12. The session is approximately 3-hours and each participant will receive a printed take-away summarising the three strategies.

### Option 2 – Virtual

A 90-minute session for a group of up to 12. The virtual option is just as interactive and each participant will receive a PDF take-away summarising the three strategies.

**Any questions? Please just give us a call on **01582 463464** – we're here to help!**

Or visit [www.thecustomerservicetrainingcompany.co.uk](http://www.thecustomerservicetrainingcompany.co.uk)



### Session outline

This is the overview for the half-day, face-to-face session. Timings are approximate and will flex depending on the needs of the group. Virtual delivery follows the same content and sequence but with different timings and excludes the *practise* section.

#### 1 Welcome to GREAT money talk (30 mins)

- What will you learn? Session overview and objectives
- *Activity: The price is right?*
- When do you lose confidence and why?

#### 2 Three strategies (90 mins)

- Know your customer – what does value mean?
  - The perception of 'value' and how it's different for us all
  - *Activity: Know your customer – what does value mean in complaints or sales situations?*
- Getting the balance right

- Getting the balance right between customer and organisation
- *Activity: Getting the balance right – what does it look like in your organisation?*
- A formula for confident and frank money conversations
  - Knowledge + Assertiveness = Confidence
  - *Activity: Being assertive in money conversations with customers*

#### BREAK (10 mins)

#### 3 Practise (F2F only – 40 minutes)

- *Activity: Practise in pairs – apply your learning in situations that you face every day*

#### 4 Action plan and close (10 mins)

- Reflect and prepare actions
- *Activity: surprise!*
- Close

Any questions? Please just give us a call on **01582 463464** – we're here to help!

Or visit [www.thecustomerservicetrainingcompany.co.uk](http://www.thecustomerservicetrainingcompany.co.uk)