

Sales Rep Discussion Guide

PERMISSIONS

Before we begin, ensure that we have proper permission from all respondents to record the session, and that we have explained how the transcripts could be used.

1. INTRO

- a. Thank you for participating today. Your participation is very important to us!
- b. The purpose of this discussion is to learn from you about how you use the IVA during sales calls and how we can help optimize the IVA. We will have 1 hour for our discussion.
- c. Some of the people working on this project are observing this discussion so that they can hear your opinions directly and take their own notes.
- d. Most importantly, there are no right or wrong answers! This is not a test of you, there are no mistakes. We just want to know about your genuine, honest opinions and experiences.
- e. Do you have any questions before we begin?

2. REP OVERVIEW

- a. To help us understand the context of your experience, can you give us a snapshot of yourself?
- b. What region are you in?

3. IN PERSON SALES CALLS

a. Sales call preparation

- i. Take a minute and think about your last in person sales call. Walk me through how you prepared for the call.
- ii. Are there differences between how you prepared for this call, as opposed to a call prior to COVID-19?
 1. *If yes* Describe what you did differently

b. Starting the call

- i. Walk me through how the conversation started
- ii. What materials did you start with?

1. [If not the IVA] Describe why you didn't use the IVA
- iii. Take me through how you decided what to talk about

c. Running the call

- i. Walk me through how this conversation went
- ii. [If they haven't mentioned the IVA] Did you start using the IVA at any point?
 1. *If yes*, show me how you used it
 2. *If no*, why didn't you use the IVA?
 - a. Could the IVA have been different to make this conversation you were having easier? Show me how it could be different.
 3. Is there anything missing from the IVA that could make this conversation easier?
- iii. Think back to another call where you talked about something different.
 1. Why did you talk about that?
- iv. Did you use the IVA for anything?
 1. *If yes*, why did you use it?
 - a. Show me what you did with it.
 2. *If no*, why didn't you use the IVA?
 - a. Could the IVA have been different to make this conversation you were having easier? Show me how it could be different

d. Closing the call

- i. Walk me through how you wrapped up your last call.
- ii. Did you use the IVA at all at this point?
 1. *If yes*, why did you use it?
 - a. Show me what you did with it.
 2. *If no*, why didn't you use it?
 - a. Could the IVA have been different to make for a better close in this situation? Show me how it could be different.
 3. Is there anything missing from the IVA that could have made for a better close?
- iii. Describe how you felt after the call.

7. GENERAL IVA QUESTIONS

- a. How often would you say you utilize the IVA?
- b. Tell me how you feel about using the IVA.
- c. Are there any challenges you face while using the IVA?
- d. Can the IVA be changed in a way to better help you on a sales call you have today?
- e. Imagine you had a magic wand and there were not legal restrictions to what you could change about the IVA, would you change anything?
 - i. Tell me more about that

8. WRAP UP

- Is there anything we didn't cover today about the IVA you would like to discuss?
- Any final thoughts before we finish?

Thank you