

Session 2 — Trainer Script

SESSION 2 STRUCTURE

Block 1 — Call + Scenario Analysis	Block 2 — 1-on-1 Preparation	Transitions / buffer
45 min	35 min	10 min

BLOCK 1 — Call + Scenario Analysis · 45 min

Content Reminder	Listen to Call	Individual Work	Trainer Reveals	Debrief
10 min	10 min	10 min	10 min	5 min

Content Reminder · 10 min

WHAT THE REPORT ALREADY TOLD US

SAY: You received Virgil's scenario before the call. The report shows: active, taking leads, making outgoing calls, below the 60-minute talk time minimum, and zero GP with 3 PQs sent. Module 2 identifies this as a specific pattern — activity metrics and financial metrics are disconnected. The effort is present. The result is not. Module 2 calls this out directly: high activity that never converts into GP is not a business result. It is a signal that something is breaking inside the conversations.

SAY: But here is the critical point. The report tells you that a gap exists between what Virgil is doing and what it is producing. What the report cannot tell you is where in the conversation the breakdown is happening. That is what the call gives you. That is the only way to give feedback that is actually useful.

Key points to emphasise:

- ★ Module 2: the report tells you something is wrong · the call tells you what
- ★ Activity metrics without financial results = the chain is breaking somewhere in the conversation
- ★ You cannot coach on a number — you can only coach on a specific moment

THREE ROOT CAUSES

SAY: Module 3 identifies three root causes of performance decline. Each requires a completely different response. Getting the diagnosis wrong means having the wrong conversation with the ITM — and making the problem worse, not better.

SAY: A skill gap is most common in newer ITMs. The signals: high effort with no conversion, short calls that end before any commitment, struggles with objections, no closing attempt made on the line. The key marker *is that the effort is present but the specific technique is missing*. Virgil is 2 months on the platform. That context shapes how you interpret what you are about to hear.

SAY: Motivation or burnout is most common in experienced ITMs with a declining trend. The signals look different: the ITM used to perform well, activity is dropping gradually, they are less engaged in team

conversations, follow-up is becoming inconsistent. The skills are still there from when they performed well — something has changed. If you open with technique coaching for a motivation issue, the ITM shuts down.

SAY: *Personal circumstances can happen at any tenure, often suddenly. Sudden shift, present but distracted, no clear skill or motivation pattern. The response here is a **supportive diagnostic conversation, not coaching at all.***

Key points to emphasise:

- ★ Tenure is the first piece of context — it tells you which root cause to investigate first
- ★ Newer ITM: look for a skill gap. Experienced ITM: look for what has changed
- ★ Diagnosing the wrong root cause = the wrong conversation

EARLY WARNING SIGNALS — MODULE 3

SAY: *Module 3 identifies four signals that appear before the numbers confirm there is a problem. Call quality on the first call — how the ITM handles the opening conversation is the earliest signal available. Lead selectivity — whether the ITM is deciding a lead is not worth calling before they have even tried. Follow-up rate — whether warm contacts are being worked consistently. And team engagement — whether the ITM is active in conversations, asking questions, contributing to meetings. Today you are working directly with call quality. This is the signal that is clearest to act on and most specific to coach.*

THE SEQUENCE — MODULE 3

SAY: *Listen to the calls first. Then speak to the ITM. Not the other way around. If you go to the ITM without having listened, **you are working from a report summary, not a coaching observation.** 'Your GP is zero and your talk time is below minimum' — that is a label. The ITM already knows the number. What they need is a specific moment they can act on. The call gives you that. Only the call gives you that.*

Key points to emphasise:

- ★ Listen before you speak — always
- ★ The feedback that sticks is the one attached to something the ITM can hear themselves doing

SCENARIO ON SCREEN

DO: Share the scenario on screen. Give trainees 60 seconds to read.

ITM Scenario — Agent Virgil

You are reviewing today's productivity report. The following is what you see for ITM Virgil — 2 months on the platform:

- Active today — logging in, taking leads, making outgoing calls
- Talk time below the 60-minute minimum for the shift
- GP: \$0 today
- PQs sent after calls: 3 — some follow-up activity is present
- No bookings recorded

You decide to listen to one of Virgil's calls from today.

Listen to Call · 10 min

SAY: *I'm sharing the call recording link in the chat now. The call is 8 minutes. Take notes while you listen — write down what the agent does, what the agent does not do, and the moment when the client changes.*

DO: Paste the call link in the chat. Start the recording at the same time for everyone.

Call Recording — Agent Virgil · Duration: 8 minutes

Trainees take notes while listening. Tasks follow immediately after.

Individual Work · 10 min

SAY: *You have 10 minutes. Four tasks — based on what you just heard. Write your answers in full sentences. When the timer ends, post all four answers in the chat.*

DO: Start 10-minute timer. After time is up: 'Post your answers in the chat now.'

TASK 1 — Call Analysis 10 min

1. What were the main issues you identified in this call? List them specifically — what the agent did and what the agent failed to do.
2. At what moment did the client's engagement drop? What caused it?
3. What is your diagnosis — skill gap, motivation issue, or personal circumstances? What specifically in the call supports this?
4. What is the single most important issue to address in the 1-on-1 conversation, and why this one before anything else?

Trainer Reveals · 10 min

SAY: *Let me share what the call shows. Compare this to what you wrote — I want to know where your analysis landed and where it differed.*

VIRGIL CALL ANALYSIS — Trainer Reference · 8 min

What happened in the call

- **Greeting unclear and unprofessional:** No proper introduction of agent name or company. First impression was weak before the conversation had a chance to develop.
- **No rapport building throughout:** The entire call ran on scripted yes/no questions. No open-ended

questions, no natural conversation flow, no connection established with the client.

- **Inappropriate destination suggestion:** Before checking any available options or prices, Virgil suggested changing the client's destination to a location 24 hours away by car. This happened before understanding what the client actually wanted — a direct signal that Virgil was not processing what the client was saying.
- **Client question misunderstood:** At one point Virgil gave an irrelevant response to the client's question. This was the turning point. The client disengaged immediately after.
- **Call ended with client hanging up:** The client made the decision to end the call. No closing attempt, no objection handling, no callback agreed, no next step of any kind.
- **Duration: 8 minutes:** Below the 10-minute standard. Not enough time for a quality sales conversation.

What Virgil did correctly — acknowledge these to the group

	What was done	What was NOT done
✓	Confirmed the client's name	Did not politely greet or introduce the company
✓	Confirmed trip details (airports, dates, passengers)	Did not build rapport or ask open-ended questions
✓	Asked about date flexibility	Did not ask for WhatsApp
✓	Confirmed flight preferences	Did not offer hotel or ask about trip purpose
✓	Offered PQ on the line	Did not attempt to close or handle objections
✓	Sent 3 PQs after the call	Did not set a callback or next step
		No positive or enthusiastic tone throughout

Q3 — SKILL GAP

The effort is present. Virgil is logging in, confirming details, offering PQs. There are no signs of disengagement or motivation issues. What is missing are the specific techniques — open questions, listening, rapport, closing sequence. Module 3: "For newer ITMs — look for a skill gap first. High effort, no conversion. Short calls."

This is not a motivation issue because:

- Virgil is making calls and sending PQs after — not giving up on leads
- Activity is consistent — no pattern of avoidance or disengagement
- 2 months tenure — this is the expected profile of a newer ITM with a skill gap, not burnout

Q4 — Priority issue: Listening and understanding the client

Before rapport, closing, TCS, or objection handling can work — Virgil needs to actually hear what the client is saying. The inappropriate destination suggestion happened because Virgil was running a script, not processing the client's actual request. The misunderstood question that caused the client to disengage happened for the same reason. Fix the foundation first. Everything else is built on it.

What a strong trainee answer looks like:

	Label	Notes / Strong answer looks like
Q1	Lists 4–5 specific issues with call evidence	Names general problems without referencing specific moments in the call
Q2	Identifies the misunderstood question as the turning point — not just "the client left"	Says "the client was not interested" without identifying what caused it
Q3	Cites effort + specific missing techniques as evidence of skill gap	Labels it "motivation" because the call went badly
Q4	Names one foundational issue with a reason	Lists everything wrong without prioritising

Debrief · 5 min

DEBRIEF — Ask the group:

- "What in this call specifically tells you this is a skill gap and not a motivation problem?"
- "If you had only read the report and not listened to the call — what conclusion might you have reached, and what would you have missed?"

BLOCK 2 — 1-on-1 Preparation · 35 min

Content Reminder	Individual Work	Trainer Reveals Model	Debrief
5 min	15 min	10 min	5 min

Content Reminder · 5 min

SAY: *You've identified the problem. Now you need to have the conversation. Module 3 covers the 1-on-1 structure in three parts — and the order matters.*

THE THREE-PART STRUCTURE

SAY: *Part one: connection and check-in. This always comes before the data. If the ITM feels they are walking into an accusation, they defend — and you get nothing useful. Start with how things are going. Give them space to talk first.*

SAY: *Part two: specific feedback. Not a list of everything wrong — one moment from one call. The more specific the feedback, the more useful it is. 'Your talk time is low' tells the ITM nothing they can act on tomorrow. 'On the call today, when the client asked about the destination, you suggested an option before asking what they were looking for — and that was the moment they disengaged' gives them something exact to work with.*

SAY: *Part three: action plan. One SMART goal. Not five. The ITM needs to know exactly what to do differently on the next call — not a general improvement list. And the plan has a check-in date built in. A plan without a follow-up is not a plan.*

Key points to emphasise:

- ★ Open with the person — not the data. Safety drives honesty.
- ★ One specific moment from one call — not a summary of everything wrong
- ★ One SMART goal — specific, measurable, with a timeframe and a check-in date
- ★ "The plan that produces results is the one the ITM helped construct" — guide them to the conclusion, don't hand it to them

Individual Work · 15 min

SAY: *You have 15 minutes. Build your complete 1-on-1 conversation plan for Virgil — based on the call you heard and the analysis you made. Write in full sentences. When time is up, post your full plan in the chat.*

DO: Start 15-minute timer. After time: 'Post your plan in the chat now.' Give 2 minutes for posting.

TASK 2 — 1-on-1 Conversation Structure · Mirror of Assessment Part 3 · 15 min
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Build a complete 1-on-1 conversation plan for Virgil based on your call diagnosis. Write in full sentences.

1. Opening — write your first two sentences. Virgil does not know their call was reviewed. Where do you start?
2. Feedback — what specific feedback will you deliver? Reference one concrete moment from the call.
3. Action Plan — write the SMART goal you will agree on. Include a timeframe and a mid-week check-in.
4. Close — what is confirmed before the conversation ends? How and when do you follow up?

Trainer Reveals — Model 1-on-1 · 10 min

SAY: *Here is a model 1-on-1 structure for Virgil. As I read it — compare it to what you wrote. Where did you land the same way? Where did you go somewhere different?*

MODEL 1-on-1 — Agent Virgil · Trainer Reference

OPENING

SAY: *"Virgil, thanks for making time. How have the last few days been feeling — are the calls going the way you want them to, or does something feel off?"*

Let Virgil speak first. Do not mention the call review. What you hear in the first 30 seconds tells you how open the conversation will be. If Virgil is defensive or flat, spend more time here before moving to feedback.

FEEDBACK

SAY: *"I've been listening to some of your calls to understand where I can support you better. On one call today there was a specific moment that I want to talk through with you. The client asked something and the conversation went in a different direction from what they were expecting. What do you remember about how that call went?"*

[Let Virgil respond. Then:]

SAY: *"What I heard specifically: there was a moment when the client asked a question and the response didn't connect to what they had actually said. The client disengaged after that and the call ended without any option being explored. What do you think happened in that moment?"*

Guide Virgil to identify the moment — do not state it as a verdict. The goal is for Virgil to see the issue, not receive a judgment.

ACTION PLAN (SMART)

SAY: *"Let's focus on one thing this week. Before suggesting any flight option on a call — ask the client: 'Tell me what matters most to you on this trip.' One open question. That's it. It changes the direction of the whole conversation because you are working with what the client actually said, not what you assumed. By Wednesday I will listen to two of your calls and we will review them together. By Friday I want to see that question used on at least 10 calls."*

Why this goal:

- Specific: one open question, before any flight suggestion
- Measurable: 10 calls by Friday
- Achievable: one sentence, no complex technique required
- Relevant: directly addresses the root cause — not listening to the client
- Time-bounded: mid-week check-in Wednesday, full review Friday

CLOSE

SAY: "So — one open question before any suggestion. We check in Wednesday after I've listened to two calls. Is there anything right now that you think would get in the way? Anything you need from me before the next shift?"

The close confirms the agreement and opens the door for obstacles. If Virgil names something — address it now. The mid-week check-in is part of the plan, not optional.

What to look for in trainee 1-on-1 plans:

	Label	Notes / Strong answer looks like
Opening	Starts with a question about how things are going — not "I listened to your call"	Opens with the data or a list of issues
Feedback	References one specific moment from the call	Lists multiple problems without referencing a specific moment
SMART goal	One behaviour — specific enough to act on tomorrow	Multiple goals or a general instruction ("improve your calls")
Close	Confirms agreement and sets a check-in date	Ends without a follow-up plan

Debrief · 5 min

DEBRIEF — Ask the group:

- "What is the risk of opening the 1-on-1 with: 'I listened to your call today and there are several issues we need to discuss'?"
- "The call had many problems — greeting, listening, closing, objections, rapport. Your action plan covers one behaviour. Why one and not the full list?"
- "On Wednesday you listen to two calls together. What specifically are you listening for — and what would change your next step?"

Session Close

SAY: Today you diagnosed a real call and built a full 1-on-1 plan around what you heard. That is the complete cycle — data to call to conversation.

SAY: Next session — mini presentations and case resolution. You will be presenting to your community as if it is a live group meeting, and handling three difficult situations that advisors face day to day. Come in having reviewed Modules 1, 2, and 3 — specifically how advisors run group meetings and how they handle public disputes. The quality of your presentation will depend on how well you know the material.