

# Customer Training Worksheet

## INSTRUCTIONS

This worksheet is designed to be completed as you are listening to the recorded "Step 1 - Get Paid by Gathering Customers" .mp3 recorded training call which is the first thing you will see in the Team Zone section of AmbitPros.com. In case you were somehow handed this worksheet in printed format the password to get into the Team Zone is "gopro".

Listen to the recorded training call, take notes on it and then complete this worksheet. Upon doing so you will have a solid understanding of and confidence in the process gathering customers.

## EXPECTATIONS

On average, what is the number of "prospective" customers I'll need to talk to before acquiring the number of "actual" customers I need to get paid and hit at least Jump Start 1 in my first few days of business?

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Who are the types of people I should be talking to as I look to gather my first couple customers to get paid and trigger?

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What are the 3 keys to success in gathering customers

1. \_\_\_\_\_ 2. \_\_\_\_\_ 3. \_\_\_\_\_

# Step-By-Step Customer Gathering

## STEP 1: ASK FOR A FAVOR

- Understanding The Process - The ultimate favor (which actually does not come up till step 2) is not that you expect them to be your customer, but rather that they will give you the opportunity to compete for their business. If you get any rejection on these first two steps then you have unknowingly given the wrong impression and need to re-clarify exactly what the favor is that you are asking for.
- Helpful Verbiage - *“I need a favor... It’s really important to me... Isn’t going to cost you a dime... Won’t inconvenience you... I just need a few minutes... Can you help me out?”*
- Tip – It’s important you ask for the favor and get their affirmative “yes” response without telling them the exact details (which begins in step 2). At this point you should only be talking to people who will help you out regardless.
- Question - Your goal in this step is to sell what? \_\_\_\_\_ (Hint: It’s a 4 letter word)

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## STEP 2: EXPLAIN WHY YOU NEED IT

- Understanding The Process – In step 1 we established the need for a favor that only required a few minutes of their time. Step 2 is essentially just explaining what it is we need their time for. If done right there is ZERO PERCENT change of rejection in either of these first two steps.
- Helpful Verbiage - *“After a lot of research I started a new business dealing with energy deregulation... I’ve partnered with a licensed electricity and/or natural gas supplier here in \_\_\_\_\_... They also happen to be the #1 company on Inc.500... As you can probably guess our business is helping people save money on their utility bills, now [firstname], I’d never ask you to be my customer if it didn’t make sense for you”*
- Tip – This is a transition step. Very rarely will you accomplish all 4 steps on the first call!
- Question - Before moving forward, what must the prospect have with them?

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## NOTES:

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### STEP 3 – ESTABLISH CREDIBILITY

- Understanding The Process – This is the MOST IMPORTANT STEP BY FAR! If you are getting rejection then the odds are better 90% you failed in this step. The general public does not understand that switching supply companies is safe and they fear the process. If you do not combat this fear you will not get the customer! Even in Texas where people are much more educated and deregulation common knowledge, this step is no less important.
- Helpful Verbiage - *“I don’t want to assume anything so first off, how much do you know about energy deregulation here in \_\_\_\_\_?... Do you understand how the process of switching energy supply companies works?... Are you aware that your local delivery company will not change and that our state public utilities commission regulates the whole process to ensure customers will be serviced equally no matter who they choose as a supply company?... Even though every company goes through serious scrutiny before getting approved as a licensed energy provider, I want you to know the company I’ve partnered with is in its own category, Ambit Energy has a BBB A-rating and as I think I’ve mentioned before they are also #1 on Inc.500... As you can see I’ve done an intensive amount of research into this business but more importantly I’ve made a serious commitment here because... \_\_\_\_\_[this is where you should toss in a bit of your “why” for doing the business\_\_\_\_\_”*
- Question - What are the 3 area of credibility? Order is very important!
  1. \_\_\_\_\_
  2. \_\_\_\_\_
  3. \_\_\_\_\_

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## STEP 4 – PRESENT THE VALUE PROPOSITION

- Understanding The Process – Presenting the value proposition is an important step of the process... but not the only step of the process! There is a reason for all 4 steps and there is a reason for the order of the 4 steps... don't tinker with the proven formula!
- Helpful Verbiage - Presenting the value proposition depends on what state you reside...

[Rate Quote States] - *“As I mentioned previously I would never ask you to be my customer unless it made sense for you, so let's take a look at the numbers and see what kind savings we're really talking about...”*

[Guaranteed Savings States] - *“As I mentioned previously I'd never ask you to be my customer unless it made sense for you, part of the reason I'm excited to represent Ambit is they are the only company in the marketplace to offer a written guarantee of savings, here is how it works... the beauty of Ambit's plan is that it's a zero loss proposition...If Ambit were not following through on the guarantee it is highly unlikely they would have an A rating with the BBB or be #1 on Inc.500... In fact if Ambit does not follow through with the savings they know their customers will switch back since there are no contracts or commitments whatsoever, this is what forces Ambit to deliver...”*

- Question - What 3 important aspects of Ambit's service should you NOT mention until after your prospect has agreed to become a customer?

1. \_\_\_\_\_ 2. \_\_\_\_\_ 3. \_\_\_\_\_

Question - Under what scenario and at what point in the process would it make sense to introduce the opportunity side of the business?

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