

CI for Sales and CS: Training exercise

Training exercise

About this resource

Self-serve resources like battlecards are a great start, but we also need to give our teams a chance to practice their skills in a low-stakes environment.

Yes, sales role play can be awkward. But would you rather practice with a friendly face who's here to give you feedback, or practice on your \$125K ARR account?

I recommend running this at the single team level, with 6-12 participants. Try to have two facilitators for this exercise: One to play the role of the customer, the other to take live notes during the exercise.

Training exercise: Your lesson plan

10-15 minutes

Introduce top competitors and key ideas for differentiation

- Facilitator presents this content as a set up to the exercise
- Hold off on questions for now – make sure you get to the exercise with plenty of time

5 minutes

Set up role-play scenario

- Show a slide with a real (or realistic) customer scenario
- Include relevant details such as:
 - Customer persona
 - Vertical
 - Buying stage
 - Competitors under consideration

5 minutes

Team uses battlecards to prepare for the role play conversation

- ★ Tip: Play some instrumental music in the background by selecting “Share computer sound” when you share your screen in Zoom!

15–20 minutes

Act out role play conversation

- One facilitator plays the role of the customer.
- Set expectations that each person should contribute at least once.
- Set expectations that role plays can be awkward, but it's about the learning experience in a low-stakes environment.
- Use a "popcorn" style format where you just ask for one idea or question from each participant at a time. Customer responds, then whoever is ready to jump in goes next and keeps the conversation going.
- Set expectations that each person should contribute at least once.
- Have your second facilitator take live notes while the exercise is going on.

15-20 minutes

Debrief + open Q&A

- End scene and shake out the awkwardness of role play!
- Ask the team to reflect on how they thought it went, start with what worked well, then what would do differently.
- Discuss VARS framework as a structure for handling competitive conversations.
- Have a second facilitator reveal the live notes so the team can see for themselves where they used VARS and where they strayed from it, skipped it a step, or spent too long on a step.
- End with open Q&A about competitive positioning, including any live deal examples and low-tier competitors. (Teams will often want to vent about competition after this exercise - let it happen!)

P.s. We've got a whole course on [Sales Enablement](#), too.