

# NEW ACCOUNT EXECUTIVE TRAINING

## TABLE OF CONTENTS

### Leader Checklist

### Self-Study

S1 Internet Advertising Lingo .....	S1-1
S2 Introduction to Special Reports and Banners .....	S2-1
S3 Goldmine .....	S3-1
S4 Industry Analysis.....	S4-1
S5 Your Site.....	S5-1
S6 Other BizSpace Sites .....	S6-1
S7 Statistics Reports.....	S7-1
S8 Traffic Report.....	S8-1
S9 Competitor Sites and Print Publications .....	S9-1
S10 Prospecting/Developing Leads/Researching the Prospect....	S10-1
S11 Opportunity Forecast.....	S11-1
S12 Proposals.....	S12-1
S13 Order Forms .....	S13-1
S14 Listening to Calls.....	S14-1

### Leader Guide

L1 Media Kit.....	L1-1
L2 The Art of Selling Multiple Sites, Options, and Months .....	L2-1
L3 Suggested Goals for Each Type of Call .....	L3-1
L4 After the Sale .....	L4-1

### Appendices

Appendix A – History of BizSpace .....	A-1
Appendix B – BizSpace Articles .....	B-1
Appendix C – Benefits of Advertising with BizSpace.....	C-1
Appendix D – Order Form and Instructions .....	D-1
Appendix E – Self-Feedback Form.....	E-1

This page intentionally blank.

# LEADER CHECKLIST

---

**LEADER'S NAME:**

**ACCOUNT EXECUTIVE'S NAME:**

**DATES OF TRAINING:**

---

## INITIAL INTRODUCTION

These tasks should be accomplished by the Account Executive (AE) and their supervisor (or the person designated to lead the training experience). Materials the trainer can refer to or make copies of are shown underlined and in italics.

- o **Review the history of BizSpace – 30 minutes.** Give the AE a copy of Appendix A - History of BizSpace. Review some of the advantages of working for BizSpace. Show the AE the BizSpace website. Encourage them to read the articles in the News section. Additionally, Appendix B contains some previous articles that feature BizSpace. Appendix C shows some benefits that advertisers may experience when advertising with BizSpace. You may want to make copies of these for the AE.
- o **Introduce the AE to others in the company – 30 minutes.** Introduce the AE to individual departments in BizSpace and how they will interact with the Sales group. Ensure that the AE has a “cheat sheet,” such as an organization chart or employee phone list, to have a visual reminder of who they met.
- o **Human Resources (HR) – 30 minutes.** Ensure that arrangements have been made for the AE to meet with someone in HR to complete W9, 401(k), insurance forms, etc.
- o **Compensation Plan – 15 minutes.** Review the current compensation plan and incentives. Allow for questions from the AE.
- o **Training Materials – 15 minutes.** The trainer explains the process of the AE Training. Give them their materials – all of the Self-Study sections. Explain that there will be times for self-study, when the AE studies alone and the trainer is available for questions, and there will also be times for interactive training. The training material should be completed in the order it is presented, if possible. Explain that the AE is responsible for learning the material and the trainer will check for understanding at the end of each section.

**SELF-STUDY**

The AE will complete these sections using the Self-Study materials. The suggested time frames are presented in bold. The Trainer should check with the AE periodically to ensure that he or she is progressing through the materials.

- o **S1 Lingo – 30 minutes.** The AE will spend some time looking up Internet advertising lingo. If you have any other sources for advertising lingo information, you may want to provide a copy to the AE. The AE will complete the question and answer section at the conclusion of this section. You may want to review the answers with the AE.
- o **S2 Introduction to Special Reports and Banners – 30 minutes.** The AE will review a Media Kit while looking at banners on the computer and archived Special Reports (formerly called Special Sections). They should not expect to be experts on Special Reports, banners, pricing, etc. At this point, they just need to understand what banners are and what Special Reports are. You should provide the AE with a Media Kit and some archived Special Reports for an established site.
- o **S3 Goldmine – 45 minutes.** In this section, the AE will be instructed to work with Jonathan to set up their password, User ID, etc. Jonathan will also get them started with the basics of Goldmine. It is important that the AE doesn't try to become an expert on Goldmine yet. They will have plenty of time to practice Goldmine during their training time. They should not spend more than 45 minutes on Goldmine. You may want to check with them at the end of this section to make sure they can do the basics in Goldmine.
- o **S4 BizSpace Industry Analysis – 30 minutes.** The AE will study the Industry Analysis for their site or silo. This will help them start to learn about their site. They do not need to know the information in detail. This is only an introduction to their site. You may want to quiz them briefly on how they can use this readership and competitor information.
- o **S5 Your Site or Silo – 3 to 4 hours.** The AE will spend a significant amount of time reviewing their site or silo. During this time, you may want to check in with them to see if they have any questions and to make sure that they are learning something from the site. Feel free to ask them questions that evaluate how well they know the site. Even if they don't know the answer, it will prompt them to look deeper into the site.

**SELF-STUDY**, CONTINUED

- o **S6 Other BizSpace Sites, including corporate – 1 hour.** The AE should spend some time on these sites, but only to get a rough idea of what they contain. The AE does not need to be an expert on the other sites.
- o **S7 Statistics Reports – 30 minutes.** The AE will be directed to the Live Stats site. They will be guided through a few activities that will familiarize them with the report. They will also be required to start thinking about how they can use the reports to prospect.
- o **S8 Traffic Report – 30 minutes.** The AE will be directed to the Traffic Report. They will be guided through a few activities that will familiarize them with the report. They will also be required to start thinking about how they can use the Report to prospect.  
*{Note: Until the new Traffic Report is established, this section is only a placeholder.}*
- o **S9 Competitor Sites and Print Publications – 30 minutes.** The AE will be reviewing their competitors' websites and print publications. They may need some information from you about who their competitors are. After they complete this section, you may want to quiz them on their ideas for keeping up with competitor information or give them some ideas that have worked for you.
- o **S10 Prospecting/Developing Leads/Researching the Prospect – 1 hour.** The AE will be given lots of information about other publications that may help them develop leads. At the end of this section, they will have to start developing their own leads and document them in Goldmine. They will also be encouraged to develop a "plan" that will guide them in developing leads in the future. You may want to give them some additional ideas for developing leads.
- o **S11 Opportunity Forecast – 30 minutes.** The AE will start understanding the Opportunity Forecast and entering leads into it. Make sure they have received the template from Jonathan.

## INTERACTIVE

Use the Leader materials to guide the AE through these sections. Note that the AE does not have any written materials for these sections. The Leader's Guide shows the materials you will need, the subjects to discuss, and some activities to check learning.

- o **L1 Media Kit – 30 minutes**
- o **L2 The Art of Selling Multiple Sites, Options, and Months – 45 minutes**
- o **L3 Suggested Goals for Each Type of Call – 45 minutes**

## SELF-STUDY

The AE will complete these sections using the Self-Study materials.

- o **S12 Proposals – 30 minutes.** The AE will work through the basics of preparing a proposal. They will be completing a practice proposal that you may want to review. Also they will need copies of the Order Form located in Appendix D.
- o **S13 Order Forms – 30 minutes.** The AE will work through the basics of preparing an order form. The Order Form instructions and blank forms are located in Appendix D. You should make copies of these for the AE. The AE will be preparing a practice order form that you may want to review.

## INTERACTIVE

Use the Leader materials to guide the AE through this section.

- o **L4 After the Sale – 30 minutes**

## SELF-STUDY

The AE will complete these sections using the Self-Study materials.

- o **S14 Listening to Calls – 2 hours.** Determine appropriate BizSpace employees for the AE to listen to. Choose those with a variety of sales techniques and sites (to learn even more about the other sites). The AE should spend about 30 minutes each with four different individuals. The AE will have assignments to complete while listening.
- o **Making calls on their own.** There is no written material for this section. You should make sure the AE is comfortable starting to make their own calls. You should encourage them to use the self-feedback sheet located in *Appendix E*. After they have made some calls and are comfortable with their technique, they should receive feedback from others within the group.

## INTERACTIVE

- o **Wrap-Up.** Have the AE review all of the sections that they have completed. They should note any questions that they still have. Help them to find the appropriate BizSpace personnel to answer their questions.

This page intentionally blank.

# L3 SUGGESTED GOALS FOR EACH TYPE OF CALL

**TIME FRAME** This section should be completed in 45 minutes.

**WHY IS IT IMPORTANT?** A new AE at BizSpace may be unfamiliar with the types of calls they will have to make. Some may be used to using a script and may need some encouragement to get started without one.

This section is designed to let the new AE gather opinions about the goals for each type of call. Since each experienced AE will have different styles, these goals are only suggestions.

You should spend some time with the AE explaining your strategies, and then let them spend 15 minutes each with two other experienced AEs. The other AEs should try to convey their call strategies and goals. You should then come back together with the new AE to ensure that the subjects listed on the next page are covered.

## SUGGESTED GOALS FOR EACH TYPE OF CALL, CONTINUED

**SUBJECTS TO DISCUSS** It is important to convey that the AE should always have a reason to call a potential advertiser. They should take the time to plan what they will say and what their goal is for the call. Some of the reasons to call might include:

- Introduce them to your site, including:
  - ◆ Targeted readers
  - ◆ News items
  - ◆ Traffic
- A Special Report subject that might be applicable to their business
- A competitor is advertising on your site, or other sites, or in print publications
- A news article relevant to their business has appeared on your site
- BizSpace launch of a new site that might be related to their business
- BizSpace has a new product offering, such as ROS banners.

Elaborate on each of these reasons and add your own. In addition, ensure that the AE understands it may take several calls to close a sale with a potential advertiser. Below are the main types of calls an AE will make:

- Initial or Introductory Call
- Follow-Up Call(s)
- Closing Call.

The general goals for each of these types of call are detailed on the next pages.

## SUGGESTED GOALS FOR EACH TYPE OF CALL, CONTINUED

- INITIAL CALL** Each new AE will develop their own style, but it is important that they accomplish the following goals in the initial call:
- Introduce themselves and their site
  - Introduce Special Reports
  - Introduce online advertising, if necessary, including fixed and ROS banners
  - Give enough information so they want to receive the Media Kit
  - Get enough information to be able to send the correct information with the Media Kit.

In addition, it is important to ask the right questions to the potential advertiser during this initial call. The AE should be gathering information as they are supplying information. Some information that might be useful includes:

- Are they currently advertising online?
- Where else are they advertising?
- Describe in layman's terms what their business is.
- Who are their potential customers?
- Who are the decision-makers in regard to advertising?

**SUGGESTED GOALS FOR EACH TYPE OF CALL,** CONTINUED

- FOLLOW-UP CALL(S)** It is important for the new AE to understand that they may need to make a number of follow-up calls to make a sale. Some of the goals of follow-up calls might be:
- Close the sale as soon as possible using the assumptive approach
  - Verify that the Media Kit was received
  - Clarify the information in the Media Kit
  - Give them some information to prompt them to look at the Media Kit
  - Gather more information about their business
  - Help them clarify which Special Reports or sites are relevant to their business
  - Clarify the benefits of advertising online
  - Clarify the benefits of your site
  - Create urgency if deadlines are approaching for Special Reports
  - Summarize recommendations
  - Help them with their internal objections, e.g., selling to their supervisor.

- CLOSING CALL** The Closing Call includes ensuring that an Order Form is completed and helping the advertiser through the steps of getting their ad online or in a Special Report. These subjects are detailed in a later section of this training.

# S7 STATISTICS REPORTS

**TIME FRAME** This section should be completed in 30 minutes.

**WHY IS IT IMPORTANT?** The Live Stats statistics reports contain an incredible amount of information regarding the “traffic” on your site and the other BizSpace sites. This information may help you to relay important traffic information to your advertisers, or it may help you to target specific companies or industry segments.

When you complete this section, you will be able to:

- Access the Alive Stats reports
- Navigate through the reports
- Use the information in the reports to enhance your prospecting and selling techniques.

**FIND OUT ABOUT IT** The Live Stats site can be found at:

<http://216.212.11.36:3344>

Once you are at the Live Stats site, type in the name of the site that you want to review. Don't type in the “www.” or the “.com” parts of the site name.

To practice, you should now go to the Live Stats site and type in the name of your site.

## STATISTICS REPORT, CONTINUED

**LOOK IT UP** When you arrive in the Live Stats site, the screen will immediately show the current active sessions on the site. You will see some basic information about each active session. To review more detailed information about each of the active sessions, you can click on the button that looks like a magnifying glass.

To access other information in the Statistics Program site, use the menus on the left side of the screen.

1. Click on the plus (+) sign next to any menu item to expand that item.
2. You must first select a date range. Expand the Date Selection option. You may choose to view by Day, Week, Month, or date range in the calendar. After making your selection, click “Update.”
3. Select the type of report that you want to view. Expand each menu item to see the types of reports available.

To learn more about the Statistics Program, you should briefly scan each type of report for your site. Note the kind of information that is available and how you can use this information in selling advertising space and Special Reports.

## STATISTICS REPORT, CONTINUED

**WHAT DID YOU  
LEARN?**

1. What is the total number of sessions on the DSLdigest.com site for February 2000?

---

---

---

---

2. What section of the HITBiz.com site was visited most often in the week of April 3–7, 2000? **Advanced option:** Can you figure out which section, **other than** the sections of the **HOME** page, was visited most often?

---

---

---

---

---

3. How many sessions are currently active on your site? What information can you gain from the Statistics Program about these sessions? If you discover any new leads from reviewing the Statistics Program, document these in Goldmine.

---

---

---

---

---

---

---

---

---

---

