

**Summary Report for Individual Task
805B-79T-3213
Conduct Telephone Prospecting
Status: Approved**

Distribution Restriction: Approved for public release; distribution is unlimited.

Destruction Notice: None

Foreign Disclosure: FD1 - The materials contained in this course have been reviewed by the course developers in coordination with the RRS, Fort Jackson foreign disclosure authority. This course is releasable to students from all requesting foreign countries without restrictions.

Condition: You have scheduled telephone prospecting in your Recruiter Zone calendar. You have access to RWS, area free from distractions, Reference materials, general office equipment and supplies, and leaders guidance.

Standard MOPP 4 conditions do not exist for this task. See the MOPP 4 statement for specific conditions.

Standard: Conduct phone prospecting by performing planning and preparation; contacting a lead; introducing yourself and the ARNG; establish rapport; identify motivator/needs; deliver appropriate ARNG program/option to satisfy motivator needs; ask for an appointment; if not obtained, ask for a referral.

Special Condition: None

Safety Risk: Low

MOPP 4: N/A

Task Statements

Cue: None

DANGER
None

WARNING
None

CAUTION
None

Remarks: None

Notes: None

Performance Steps

1. Perform planning and preparation for telephone prospecting.
 - a. Develop a pre-call plan that consists of qualified leads and background information (if available).
 - (1) Use background information to establish an opening line.
 - (2) Prepare a sales message that targets the leads to be called.
 - (3) Prepare a closing statement for optimum chances of getting an appointment (2 choices close).
 - b. Prioritize leads by known or suspected information (SASVAB Results, background information, or mental categories).
 - c. Target prospects based on mission requirements.
 - d. Apply deliberate enthusiasm and excitement to motivate the prospect.
2. Contact lead by telephone.
 - a. Identify self and the Army National Guard.
 - b. Establish rapport and build trust.
 - c. Attempt to gather some type of background information.
 - d. Transition smoothly to determining needs and interests.
3. Determine needs and interests using open-ended fact-finding questions.
 - a. Probe using THE TEAMS until a motivator is uncovered.
 - b. Identify the motivator and then the values behind the motivator.
 - c. Show a genuine interest in the lead's plans and provide positive feedback and encouragement.
4. Deliver an appropriate sales message.
 - a. Stress one or more features of the ARNG in an exciting and appealing manner.
 - b. Stress how the feature would benefit the lead and repeat the leads "What?" and "Why?"
 - c. Avoid over-selling and focus only on selling the appointment.
5. Close by asking for an appointment and offer two choices of dates, times, and locations.
6. Address concerns.
 - a. Clarify or confirm the concern.
 - b. Acknowledge the concern.

c. Answer honestly.

(1) Provide additional information or correct mis-information.

(2) Review benefits already discussed.

(3) Offset the concern by asking targeted questions to uncover additional motivators and values.

d. Close again by offering two choices of dates, times, and locations.

e. If the lead still refuses an appointment, refer lead to www.nationalguard.com and ask for their e-mail address to send them the link.

f. Ask for a referral.

7. Prequalify prospect to uncover possible moral and medical disqualifications.

a. Avoid losing rapport by becoming unnecessarily invasive, demanding, intimidating, interrogative, etc.

b. Determine prospect's prequalifying mental, physical, and moral status using APPLE-MD.

8. Confirm the appointment.

a. Ask prospect to get a pen and paper to capture appointment information.

b. Confirm or verify prospect's address (get directions if necessary).

c. Give the prospect your name and the address/telephone number of your office.

d. Confirm that the prospect has transportation if meeting at your location.

e. Reconfirm the date, time, and location of the appointment.

9. Solicit referrals and gather background information on leads.

a. Ask questions like, "Who do you know....."

(1) That might be interested in military service.

(2) In a particular teacher's class studying traditional pre-college course subject(s).

(3) That plans to pursue a vocational technical degree.

(4) In search of employment.

(5) That will enroll in a junior/community college because of financial limitations, but is academically ready for college or university-level course work.

b. Record information.

10. Document the telephone call in Recruiter Zone.

(Asterisks indicates a leader performance step.)

Evaluation Guidance: Score "GO" if Soldier correctly performs all performance measures. Score "NO GO" if Soldier incorrectly performs one or more performance measure. Provide on-the-spot correction should the Soldier experience minor difficulty. Consider directing self-study or on-the-job-training for Soldiers who experience major difficulties in task performance.

Evaluation Preparation: This task may be evaluated by two methods; a. Self Evaluation. Perform the task on the job using the materials listed in the Conditions Statement. Evaluate yourself, using the performance measures, graded IAW the Evaluation Guidance section. b. Supervisor's Evaluation. Ensure that the Soldier(s) have the material shown in the Condition Statement to accomplish the task. When you feel they are able, have them perform the task on the job. Grade them using the Performance Measures, in accordance with the Evaluation Guidance section.

PERFORMANCE MEASURES	GO	NO-GO	N/A
1. Performed planning and preparation for telephone prospecting.			
a. Developed a pre-call plan that consists of qualified leads and background information.			
b. Prioritized leads by known or suspected information.			
c. Targeted prospects based on mission requirements.			
d. Applied deliberate enthusiasm and excitement to motivate the prospect.			
2. Contacted lead by telephone.			
a. Identified self and the Army National Guard.			
b. Established rapport and built trust.			
c. Attempted to gather some types of background information.			
d. Transitioned smoothly to determine needs and interests.			
3. Determined needs and interests using open-ended fact finding questions.			
a. Probed using the TEAMS until a motivator was uncovered.			
b. Identified the motivator and the values behind the motivator.			
c. Showed a genuine interest in the lead's plans and provided positive feedback and encouragement.			
4. Delivered appropriate sales message.			
a. Stressed one or more features of the ARNG in an excited and appealing manner.			
b. Stressed how the feature would benefit the lead and repeated the leads "What" and Why.			
c. Avoided over-selling and focused only on selling the appointment.			
5. Closed by asking for appointment.			
6. Addressed concerns.			
a. Clarified and confirmed the concern.			
b. Acknowledged the concern.			
c. Answered honestly.			
d. Closed by offering two choices of appts.			
e. Referred lead to www.nationalguard.com and asked for their email address to send them the link, if the lead still refused.			
f. Asked for a referral.			
7. Pre-qualified prospect to uncover possible moral and medical disqualifications.			
a. Avoided losing rapport by becoming unnecessarily invasive, demanding, intimidating, interrogative, etc.			
b. Determined prospect's prequalifying mental, physical, and moral status using APPLE-MD.			
8. Confirmed the appointment.			
a. Asked prospect to get a pen and paster to capture appointment information.			
b. Confirmed or verified prospect's address.			
c. Gave the prospect your name and the address/telephone number.			
d. Confirmed that the prospect has transportation.			
e. Reconfirmed date, time, and location of the appointment.			
9. Solicited referrals.			
a. Asked questions.			
b. Recorded information.			
10. Documented telephone call in Recruiter Zone.			

Supporting Reference(s):

Step Number	Reference ID	Reference Name	Required	Primary
	NG PAM 601-1	Personnel Procurement - Army National Guard Strength Maintenance Program	Yes	No
	RECRUITER ZONE 2.00	Recruiter Zone 2.00 Users Manual	Yes	No

Environment: Environmental protection is not just the law but the right thing to do. It is a continual process and starts with deliberate planning. Always be alert to ways to protect our environment during training and missions. In doing so, you will contribute to the sustainment of our training resources while protecting people and the environment from harmful effects. Refer to FM 3-34.5 Environmental Considerations and GTA 05-08-002 ENVIRONMENTAL-RELATED RISK ASSESSMENT. Environmental protection is not just the law but the right thing to do. It is a continual process and starts with deliberate planning. Always be alert to ways to protect our environment during training and missions. In doing so, you will contribute to the sustainment of our training resources while protecting people and the environment from harmful effects. Refer to FM 3-34.5 Environmental Considerations and GTA 05-08-002 ENVIRONMENTAL-RELATED RISK ASSESSMENT.

Safety: In a training environment, leaders must perform a risk assessment in accordance with ATP 5-19, Risk Management. Leaders will complete the current Deliberate Risk Assessment Worksheet in accordance with the TRADOC Safety Officer during the planning and completion of each task and sub-task by assessing mission, enemy, terrain and weather, troops and support available-time available and civil considerations, (METT-TC). Note: During MOPP training, leaders must ensure personnel are monitored for potential heat injury. Local policies and procedures must be followed during times of increased heat category in order to avoid heat related injury. Consider the MOPP work/rest cycles and water replacement guidelines IAW FM 3-11.4, Multiservice Tactics, Techniques, and Procedures for Nuclear, Biological, and Chemical (NBC) Protection, FM 3-11.5, Multiservice Tactics, Techniques, and Procedures for Chemical, Biological, Radiological, and Nuclear Decontamination.

Prerequisite Individual Tasks : None

Supporting Individual Tasks : None

Supported Individual Tasks : None

Supported Collective Tasks : None

ICTL Data :

ICTL Title	Personnel Type	MOS Data
79T-ARNG Recruiting and Retention-SL3	Enlisted	MOS: 79T, Skill Level: SL3, ASI: V7, Duty Pos: REA, SQI: 4