

Course : Developing your portfolio through active recommendation: intensive workshops

Turning customers into prospecting allies

Practical course - 1d - 7h00 - Ref. RRA

Price : 810 CHF E.T.

NEW

Enriching your customer base is essential to achieving your sales objectives and growing your business. Your customers are invaluable allies in putting you in touch with new, qualified prospects. How can you structure an active referral strategy in your prospecting? How can you create the right conditions to encourage referrals? This training course will give you the practical, immediately applicable keys to making active referrals a real business gas pedal, in a win-win spirit.

Teaching objectives

At the end of the training, the participant will be able to:

- ✓ Integrate active recommendation into your sales approach
- ✓ Identify high-potential targets and influencers
- ✓ Feeling legitimate and confident in your request for a recommendation
- ✓ Formulate a request clearly and positively
- ✓ Structuring a personalized recommendation pitch
- ✓ Manage the response from the requested prescriber

Intended audience

Commercial players in all sectors wishing to increase their number of qualified prospects

Prerequisites

Sales experience and customer portfolio highly recommended

PARTICIPANTS

Commercial players in all sectors wishing to increase their number of qualified prospects

PREREQUISITES

Sales experience and customer portfolio highly recommended

TRAINER QUALIFICATIONS

The experts leading the training are specialists in the covered subjects. They have been approved by our instructional teams for both their professional knowledge and their teaching ability, for each course they teach. They have at least five to ten years of experience in their field and hold (or have held) decision-making positions in companies.

ASSESSMENT TERMS

The trainer evaluates each participant's academic progress throughout the training using multiple choice, scenarios, hands-on work and more. Participants also complete a placement test before and after the course to measure the skills they've developed.

Practical details

Hands-on work

Progressive practical workshops on know-how and interpersonal skills, role-playing, toolbox, etc.

Teaching methods

Active, participative teaching methods. Alternating theory/practice with application to the context and experience of participants.

Course schedule

1 Daring to make active recommendations: getting ready

- Understanding the power of recommendations as a prospecting lever
- Overcoming apprehension
- Working on your sales posture
- A win-win approach to referrals

Hands-on work

Exchanges : Why I don't dare ask for a recommendation". Positive reformulation exercises. Pitch workshop n°1: first draft of your recommendation pitch.

2 Identify high-potential prescribers

- Map your current network: customers, former customers, partners, personal relationships...
- Evaluate the potential of a prescriber: availability, credibility, network, affinity...
- Prioritizing the best prescribers
- Action planning

Hands-on work

Analyze customer portfolio and relationships with high-potential customers. Draw up a list of priority prescribers. Define a targeted action plan.

3 Create the right conditions for active recommendation

- Integrate recommendations into the structure of your sales talk
- Locate "the instant recommendation"
- Structuring your pitch: clarity, precision and simplicity
- Adapt your message to the prescriber's profile and the channel used

Hands-on work

Face-to-face and/or telephone customer interview scenarios. Identify signals of openness to a recommendation. Pitch workshop n°2: writing and practicing a personalized pitch in pairs.

TEACHING AIDS AND TECHNICAL RESOURCES

- The main teaching aids and instructional methods used in the training are audiovisual aids, documentation and course material, hands-on application exercises and corrected exercises for practical training courses, case studies and coverage of real cases for training seminars.
- At the end of each course or seminar, ORSYS provides participants with a course evaluation questionnaire that is analysed by our instructional teams.
- A check-in sheet for each half-day of attendance is provided at the end of the training, along with a course completion certificate if the trainee attended the entire session.

TERMS AND DEADLINES

Registration must be completed 24 hours before the start of the training.

ACCESSIBILITY FOR PEOPLE WITH DISABILITIES

Do you need special accessibility accommodations? Contact Mrs. Fosse, Disability Manager, at psh-accueil@orsys.fr to review your request and its feasibility.

4 Practice implementing active recommendation

- Manage the prescriber's responses: enthusiasm, hesitation, refusal...
- Relaunching a prescriber without pressure
- Acknowledging and rewarding referrals
- Set up a simple and effective follow-up system for recommendations obtained and to be solicited

Hands-on work

Role-playing: complete simulation of an interview including active recommendation. Pitch workshop n°3: review and optimization of the pitch and final role-play with feedback. Define your action plan for deploying referral requests.

Dates and locations

REMOTE CLASS

2026 : 27 Mar., 1 July, 21 Sep., 9 Dec.