

Name	Robin Howard	≥90%
Month	April	75-90%
Score	76 of 100 = 76%	≤75%

Your Company	
Hotel Name	Hyatt Regency Downtown
Manager Title	Sales Manager

Background and Communication

Group Tramco Electronics Caller Renee Walker

Group's Agenda					
Day	Date	Function	Set-up	# Ppl	Guest Room Block
Sun	5/3	Arrival	NA	NA	15
Mon	5/4	Meetings w/ breakfast, lunch, breaks	U-shape	22	15
Tues	5/5	Meetings w/breakfast, lunch, breaks	U-shape	22	7
Alternate Dates		Week of May 10th			

Customer's Central Interests	
Key Needs	Meeting space to accommodate "social distancing"
	Outdoor area for welcome reception
Obstacle	Room upgrades for VIP's

Communication Log			
Day	Date	Time (EST)	Comments
Thurs	4/23	10:17 AM	The customer called and spoke to Admin--Sales Manager to call back
Thurs	4/23	2:15 PM	Robin called and left a message
Thurs	4/23	2:35 PM	The customer returned the call and spoke to Robin--call was completed
Fri	4/24	9:01 AM	Robin emailed the follow-up collateral
Fri	4/24	4:02 PM	Inquiry cancelled via email

Customer Experience Play-by-Play

Robin immediately greeted the customer in a warm and friendly tone of voice. She then took the time to ask some of the qualifying questions to understand the guest's needs by using clear, open-ended clear questions, including, "Which other hotels are you considering for your meeting?" When the customer noted that she was also considering the Hilton, Robin proactively described her hotel's location and proximity to activities in the area within walking distance. After gaining many of the program details, Robin offered to check availability while the customer was on the phone. She determined that the meeting space available and was able to quote a room rate of \$149, but also offered to speak to the Revenue Manager to see if there may be anything lower to help the group get the best rate possible. When asked about getting upgraded rooms for VIP's, Robin asked clarifying questions first, asking how many upgrades would be needed and what room types would be preferred. She then said she would be able to accommodate with corner king rooms and VIP amenities, provided the anticipated group size was met. Next, the welcome reception was discussed, and the customer provided her vision for how she would like the event to flow. Robin confidently described the outdoor space that "would be perfect for this size group." Towards the end of the call, Robin asked if the customer had any questions and suggested that she call back if anything else was needed. She then finished the conversation by offering to send the customer a proposal and to follow up the next week to see if a decision had been made.

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Evaluation of Performance

Quick Access -> How rapidly a potential customer can reach you	10 of 15 points achieved <i>Points as noted below</i>	67%
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- 4 Response Time in # of Hours ≤2 hrs = 15 pts ≤5 hrs = 10 pts ≤8 hrs = 5 pts >8 hrs = 0 pts

Step 1: Start Strong -> First impression and rapport, done prior to qualification	7 of 7 points achieved <i>Points as noted for each item</i>	100%
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- Y Provides Their Name & Acquires Caller's Name (4) Y Establishes an Initial Rapport (3)

Robin quickly began to build rapport at the start of the call by asking the customer how her day was going.

Step 2: Question Time -> Asking qualifying questions to understand the caller and the event	11 of 16 points achieved <i>1 pt each unless noted</i>	69%
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| <u>Y</u> Caller's Title/Role | <u>Y</u> Spending Habits/Budget |
| <u>Y</u> Purpose and/or Type of Program | <u>Y</u> Competitors Being Considered |
| <u>Y</u> Event Cancelled/Postponed from Earlier | <u>N</u> Additional Future Business |
| <u>Y</u> Full Program Agenda | <u>Y</u> Decision Date |
| <u>B</u> Date Flexibility (B=before quoting availability, A= after) | <u>Y</u> Decision Maker |
| <u>N</u> Important Factors (3) | <u>Y</u> Payment Method/Deposit Policy |
| <u>N</u> History/Past Practices | <u>Y</u> Effective Open & Closed Questions |

In order to better understand how to best sell the hotel, Robin could also ask about the customer's important factors. For example, "What may be most important to your group when choosing a hotel for this meeting?" Understanding more about the history of the group's program would also allow her to learn more about what may have been successful or unsuccessful in the past, which would allow her to specifically leverage this information during the sales process. And to help probe for future business, she could also ask, "Does the group have any other meetings planned in our area for later this year?"

Step 3: Get Down to Business -> Presentation and selling of hotel and area information	15 of 19 points achieved <i>2 pts each unless noted</i>	79%
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| <u>Y</u> Sells Features and Benefits Based on Needs (3) | <u>N</u> Creatively Describes Menu Options |
| <u>Y</u> Proactively Benefit Sells Hotel Amenities (3) | <u>Y</u> Benefit Sells the Area |
| <u>Y</u> Proactively Addresses COVID-19 Concerns | <u>Y</u> Offers Value-Adds/Incentives |
| <u>Y</u> Knowledgeable About Hotel, Local Area, etc. (3) | <u>N</u> Attempts to Upsell |

Samples of Information Presented	
Features & Benefits	It's only a 10 minute ride into downtown, where your guests will be within walking distance of a variety of restaurants and other attractions in the evening.
Value-Adds	The manager offered to upgrade 5 rooms to executive suites at the group rate.
Upsells	None given.

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	Quote	Faded To	% Change
Meeting Room Rate	\$500.00	NA	NA
Guest Room Rate	\$149.00	\$139.00	7%
F&B Minimum	\$500.00		

Step 3: Making a Move Forward -> <i>Helping to move the customer towards taking action</i>	6 of 6 points achieved <i>2 pts each</i>	100%
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| <u>Y</u> Suggests/Asks for Customer Action | <u>Y</u> Explains Benefits of Taking Action |
| <u>Y</u> Takes Away Risk (Incl. Stating Cancellation Policy) | |

Step 3: Jumping Over Obstacles -> <i>Overcoming obstacles through education or negotiation</i>	6 of 6 points achieved <i>2 pts each</i>	100%
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| <u>Y</u> Asks Questions to Clarify | <u>Y</u> Handles Obstacle Appropriately Based on Type |
| <u>Y</u> Endorses the Customer's Obstacle | |

Because Robin had learned through qualification that the customer was interested in her attendees being able to enjoy the local area, she was able to successfully promote the hotel's convenient location close to the downtown area. To further enhance the customer's interest, she could also incorporate a brief description of recommended menu items, which would help the customer begin to visualize her group enjoying their event there and build interest. She could also attempt to upsell by suggesting other evening events in addition to the welcome reception the caller asked about, describing how they would fit into the group's specific agenda.

Step 4: Finish Confidently -> <i>Closing the sale and setting clear follow-up steps</i>	5 of 8 points achieved <i>3 pts each unless noted</i>	63%
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| <u>N</u> Attempts to Gain Commitment | Close attempt: <u>None given</u> |
| <u>Y</u> States/Restates Clear and Specific Next Step | |
| <u>Y</u> Personalizes Closing (1) | <u>Y</u> Thanks the Caller (1) |

Robin nicely personalized the end of the call by wishing the customer better weather that afternoon, as they had discussed that the morning was stormy. To attempt to secure the group's business more directly, Robin could also proactively attempt to close the sale by asking, "In addition to the proposal, could I also send you a contract at this time?"

Step 5: Delivering On the Last Impression -> <i>Professional follow-up process and materials</i>	6 of 7 points achieved <i>1 pt each unless noted</i>	86%
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| <u>Y</u> Follow-Up Received w/in Quoted Timeframe (2) | <u>Y</u> Agreed-Upon Materials Enclosed |
| <u>Y</u> Professional Email Appearance & 3 or Fewer Errors | <u>Y</u> Menus Included |
| <u>Y</u> Email Content Personalized & All Needs Addressed | <u>N</u> Suggests Next Step w/Date |

As a follow-up, Robin sent personalized collateral the morning following the call, including relevant menus and information about the local area (as had been promised). She indicated that she would follow up with the customer "soon," but could include a more specific date, such as, "I will call to follow-up on Monday, May 4th." This not only appears more confident, but strengthens the expectation that they will be moving forward in the process instead of leaving it "up in the air."

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Show Off Your Hospitality Skills -> Overall impression you give throughout the call	8 of 11 points achieved <i>1 pt each unless noted</i>	73%
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| <p><u>Y</u> Info Presented is Clear and Organized (2)</p> <p><u>Y</u> Conveys Reasonable Confidence (2)</p> <p><u>N</u> Establishes Solid Rapport Throughout (2)</p> <p><u>Y</u> Uses Caller's Name >=2X</p> | <p><u>Y</u> Friendly, Appropriate Tone</p> <p><u>N</u> Effective Questioning & Listening</p> <p><u>Y</u> Professional, Courteous Language</p> <p><u>Y</u> Call Flow Managed & Comfortable Pace</p> |
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Throughout the call, Robin used an amiable tone of voice that was approachable, but not over the top. She also sounded very compassionate and understanding when talking with the customer about the hotel's COVID-19 preparations and the customer's previously cancelled events. She could strengthen her relationship with the customer and build more lasting rapport through the call by engaging in some further conversation with the customer, such as asking about the area where the caller resides. Additionally, she could be sure to listen carefully or enhance her note-taking process to avoid asking the budget question twice.

Decision Time -> Ultimately, the customer makes the choice	2 of 5 points achieved <i>Points as noted below</i>	40%
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- M Would Caller Choose to Do Business with Manager? *Definitely = 5 pts, Maybe = 2 pts, No = 0 pts*

The top three things to move the customer towards a "definitely":

- 1) Directly and confidently attempt to gain (assume the sale) the business during this initial phone call.
- 2) Offer possible menu suggestions for the group's lunches during the initial call instead of relying on the customer to wait and read the emailed menus.
- 3) Continue to build conversational rapport throughout the call (in addition to that done during the start of the conversation) by making small talk with the customer, perhaps about the customer's company or the area where she is located.