

# Skill Training to Strengthen Business Proposals to Customers

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## Abstract

**Our company has long focused on education and training for our sales and technical members. We provide these training programs with the goal of developing multi-skilled personnel by providing deeper product knowledge and acquiring a variety of skills.**

**In addition to performing traditional maintenance and inspection tasks based on the knowledge gained through training, we also proactively inspect customer equipment, reporting issues on the equipment's condition and the operating environment and proposing improvements to resolve such issues as needed.**

**As these business proposal activities to customers become more frequent, each employee is required to have not only product knowledge and technical skills but also business proposal skills. Acquiring and improving these business proposal skills is an urgent priority for our company.**

**To that end, we are planning, developing, and holding internal training programs to strengthen business proposal skills for younger employees.**

## 1 Preface

In 2015, we launched a company-wide “one-stop service safety risk assessment and consultation (SRAC) service initiative.” This initiative primarily targets customers who do not do business with us or who have become out of touch for a longer period of time.

The definition of our “one-stop SRAC service” is “a comprehensive service that handles everything from identifying to resolving issues with a customer’s electrical and other equipment.” Issues identified during on-site inspections are first reported as findings. Furthermore, a wide range of reports, or “business proposals,” are required. The wide range of reports include the risks of the issue, the problems that could arise from ignoring the risks, solutions, and, in recent years, CO<sub>2</sub> reduction and energy saving proposals.

In addition to technical knowledge of the applicable facilities, this initiative also requires the ability to compile such reports and make an effective presentation, or collectively “business proposal skills.”

Our employees have deep knowledge of Meiden’s major facilities equipment and products.

However, there were few employees who could provide customer-driven effective business proposals to customers – advising them on what is happening out there and what countermeasures are recommended based on the equipment issues identified. As such, there is an urgent need to improve their business proposal skills. This article introduces the training we provide to our younger employees to improve their business proposal skills.

## 2 Business Proposal Skills Training Initiative

Our company has long placed a strong emphasis on employee training.

For technical members (engineers or technicians), we provide training to acquire deeper knowledge of individual facilities and to develop multi-skilled skills to handle multiple facilities.

For sales members, we provide training on best sales practices, explanations on various relevant laws and regulations required for in-house operation and maintenance (O & M) service company of the original electrical equipment manufacturer, and basic training on the products we handle.

While we offer a wide variety of training programs, we have not previously offered training aimed at “improving our ability to make business proposals to customers.”

In response to the urgent need to strengthen and improve our employees’ business proposal skills through our one-stop service initiative campaign, we planned and implemented two in-house training programs related to business proposal skills.

One was an educational program outsourced to an external training specialist, focusing on improving sales behavior and motivation.

The other was training planned and implemented in-house. This article introduces this in-house “Business Proposal Skills Enhancement Training Program.

### 3 Holding Business Proposal Skills Enhancement Training Program

#### 3.1 Setting Training Goals

In preparing for the business proposal skills enhancement training program, we established a training concept and goals.

(1) Concept

- (a) Raise awareness and confidence among participants.
- (b) Shift from “learning” to “practice” and “motivate participants to teach.”

(2) Goals

- (a) Acquire the skills to listen to and define true customer’s needs and goals in order to gain customer trust.
- (b) Develop the ability to propose solutions to identified issues.
- (c) Acquire methods for clearly putting proposal content into proposal documents.
- (d) Develop the ability to effectively present proposal materials.
- (e) Develop the ability to apply the knowledge gained in the training program to their own workplace.

#### 3.2 Role-Playing-Centered Training

Traditionally, group training has often focused on classroom learning, making it difficult for participants to maintain high levels of concentration. Our proposal skills training focuses on sustaining participants’ interest in the lectures, focusing on role-playing, with classroom learning as a secondary



Fig. 1 A View of Group Work

The role-playing curriculum involves participants working in groups to discuss a topic (customer’s issue), followed by a presentation.

component. Fig. 1 shows group work using role-playing.

Role-playing is designed to simulate situations likely to be encountered in actual work, designed and implemented to make participants feel the experience is familiar.

Group work using role-playing also serves another important purpose. Younger employees gathered from locations across the country rarely have business contact with each other in their daily work. Therefore, role-playing is positioned as an important part of the curriculum, serving as a means of connecting each other.

#### 3.3 Mock Safety Assessment Walk by Role-Playing

A Safety assessment walk is an important activity in one-stop service, and is our term for the on-site inspection of customer facilities mentioned above.

Our proposal training curriculum is centered around this mock Safety assessment walk, designed to improve business proposal capabilities.

Our company has training facilities where participants can practice using actual equipment, such as substations and power distribution facilities. In the mock Safety assessment walk, we use these training facilities as a model for the customer’s facilities, and role-playing of on-site inspections is conducted.

A conventional training program using role-playing typically begins with classroom instruction, followed by role-playing and group work to confirm the learning.

However, in our mock Safety assessment walk and role-playing, we deliberately reverse this order. Before classroom instruction, participants engage

in role-playing and group work based on their current experiences and knowledge, and then make group presentations based on the results. The presentations are generally quite immature.

Then, participants attend classroom instruction. The key to this classroom training is to link and synchronize the hypothetical situations in the role-playing with the content of the lecture. This allows participants to discover important learning points set forth in the role-playing during the lecture, helping them maintain their concentration.

Furthermore, after the lecture, a role-playing exercise is conducted again, this time with the exact same situation. Participants incorporate the knowledge gained in the lecture into a simulated Safety assessment walk and group work, discuss it, and then present their work again.

The content of each participant's presentation after the second group work session was significantly improved compared to the first one. This led to participants becoming aware of their own technical shortcomings and gaining greater confidence, which is consistent with the concept of this training to strengthen business proposal skills.

### **3.4 Role-Playing to Improve Listening Skills**

Along with proposal skills, an important ability is the ability to effectively communicate with customers, or in other words, listening skills. During the Safety assessment walk, it is necessary to identify and highlight potential issues related to the customer's equipment and its operational conditions from the conversation with the customer.

This training also includes role-playing to improve listening skills. Participants imagined a situation in which a customer inquired about equipment in use, and worked in groups to discuss what questions to ask.

The curriculum then involved a mock meeting with the instructor playing the role of the customer, identifying and highlighting potential issues given the situation and proposing solutions.

### **3.5 Business Proposal Preparation and Presentation**

Our primary business is the O & M services of various Meiden-manufactured and supplied equipment. If, as a result of the inspection work, any malfunctions, failures, or early signs of potential failure are detected in the target facilities or products, these matters are noted as findings in the post-O &

M service work report.

Because these post-O & M service work reports encourage customers to repair, maintain, or replace equipment, business proposal skills were not particularly important.

However, as part of our company-wide one-stop service initiative campaign, we were forced to make business proposals to customers as a result. However, the content of proposals presented to customers varied depending on the drafting persons, creating a need to improve the quality and standardize the content of business proposals across the company.

This curriculum provides fundamental and foundational instruction on topics such as proposal document structure and developing a customer-driven approach to content, ensuring clarity for non-technical clients. The ability to effectively present the contents of a proposal to a customer is also important. Rather than simply reading the proposal contents aloud, it is necessary to explain at a pace that reflects the customer's reaction during the meeting. Younger employees have less working years at the company and therefore less opportunity or experience to make presentations in front of third parties. This curriculum was designed with the goal of providing multiple presentation experiences to the participants and developing confidence in conducting presentations. The positive results of this program were confirmed by watching the participants' presentations after various role-playing works and group work sessions.

### **3.6 Implementing Training Results in Their Workplace**

In conventional methods, participants tend to think that after the end of the training program, everything is over. In addition, training organizers rarely pay attention to how participants would apply the gained knowledge through the program.

Therefore, this training curriculum incorporates group work in which participants discuss and present effective ways to implement the course content in their own workplaces. With this curriculum, participants are not taught anything by the training organizers. The participants, who were of the same age, freely discussed development methods and incorporated insights from other participants' comments and the content of other groups' presentations into their own work, hoping to lead to effective implementation in their own workplaces.

## 4 Classroom Lectures

As mentioned above, the classroom lectures in this training program are intended to complement the role-playing and group work.




(1) **Current State of the Company:** The target participants, younger employees, are overwhelmed by the tasks at hand and have few opportunities to learn about the company's current situation from a higher-level perspective. This curriculum explains the company's current situation and order status.

(2) **Presentation of Successful Cases:** The most effective way to raise awareness of one-stop service initiatives is to showcase the success of our

activities in getting orders. We present successful examples that solved customers' issues through inventive mindset.

(3) **Safety Assessment Walk of Substation Equipment:** This course explains the various key facilities and products that make up substation facilities. It covers key points to check during Safety assessment walk, the risks associated with those facilities and equipment, and how to propose them. **Fig. 2** shows an excerpt from the textbook used in this curriculum.

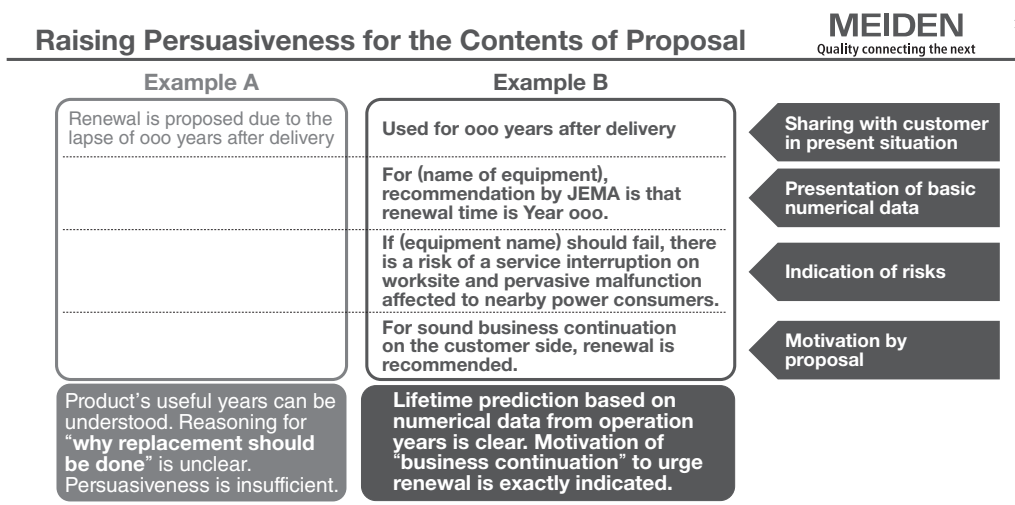
(4) **Proposal Preparation and Compilation:** This course explains how to prepare and compose proposals that customers will find compelling. **Fig. 3**

| Check Points for Switchgear – Panel Surface –                                       |                  |                   |   |  |   | MEIDEN<br>Quality connecting the next |  |
|---|------------------|-------------------|---|--|---|---------------------------------------|--|
| External appearance   | Equipment name   | Status            | Check point   | Risks  | Item of proposal  | Recommended year of replacement       |  |
|    | Protective relay | Aging             | <ul style="list-style-type: none"> <li>Operation exceeding the recommended replacement year</li> <li>Rust generation (greenish blue) around the induction disk</li> </ul>   | <ul style="list-style-type: none"> <li>Sequence control error upon the occurrence of malfunction</li> <li>Burning in protected targets (transformer, rotary machine, cables, etc.)</li> <li>Influence of a service interruption upon power receiving area ahead</li> </ul> | Replacement   | 10~15 years                           |  |
|   | Control fuse     | Aging             | <ul style="list-style-type: none"> <li>Operation exceeding the recommended replacement year</li> </ul>  | <ul style="list-style-type: none"> <li>Cable breakdown below rated current due to secular deterioration</li> <li>Burning in protected targets (auxiliary relay, instruments)</li> </ul>  | Replacement   | 10 years                              |  |
|  | Auxiliary relay  | Aging environment | <ul style="list-style-type: none"> <li>Operation exceeding the recommended replacement year</li> <li>Oxidation and an increase in contact resistance due to corrosive gases</li> <li>Fogging inside the relay case, blackening around inner contacts</li> </ul> | <ul style="list-style-type: none"> <li>Accidental breakdown control errors and sequence control errors due to oxidation films around contacts</li> <li>Risks caused by production discontinuation of auxiliary relay ooo</li> </ul>  | <ul style="list-style-type: none"> <li>Measurement and confirmation of contact resistance values in auxiliary relays in each room with the use of contact resistance measuring device</li> <li>Replacement (possibly changes in cabling)</li> </ul> | 8 years                               |  |

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**Fig. 2** Excerpt from Safety Assessment Walk Inspection Textbook about Substation Facilities

The training includes a summary of points to check and risks to take when conducting Safety assessment walk inspection on power receiving and distribution equipment, as well as how to make business proposals to customers, for each facility and product.

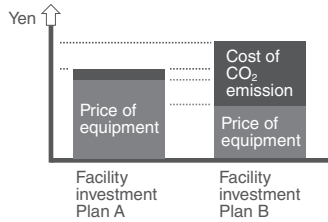


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**Fig. 3** Excerpt from Textbook a Text on How to Prepare and Compile a Business Proposal

This text explains how to compile and draft a business proposal to customers.

For an enterprise demonstrating its goal relating to climate change, it is difficult to attain the goal of CO<sub>2</sub> reduction if this firm simply implements a policy for the investment recovery from a viewpoint of simple economic efficiency.



For example, assume that we are going to examine Plan A and Plan B for a certain facility investment. As shown in the left drawing, when selecting equipment between Equipment A where CO<sub>2</sub> emission is small, and Equipment B where CO<sub>2</sub> emission is small, it becomes possible to make selection in consideration of decarbonization. If judgment by ordinary cost only is made, Plan B may be selected. **If CO<sub>2</sub> emission cost is additionally taken into consideration, Plan A may be selected.**

If pricing for CO<sub>2</sub> emission is considered and **Internal Carbon Pricing (ICP)** is applied, CO<sub>2</sub> emission cost can be converted into a price, and **decarbonization investment can be promoted**. In addition, **revenue opportunities and risks relating to decarbonization can be specified**.

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**Fig. 4 Excerpt from Texts Relating to Energy-Saving and Decarbonization**

Energy-saving, history of decarbonization, and technical terms the company's employees should know are explained. The decarbonization approach that can be proposed to our customers is also explained.

shows an excerpt from the textbook used in this curriculum.

(5) Sales Activities: As sales representatives and sales engineers increasingly visit customers, this course explains basic business etiquette and the mindset required for engaging with customers.

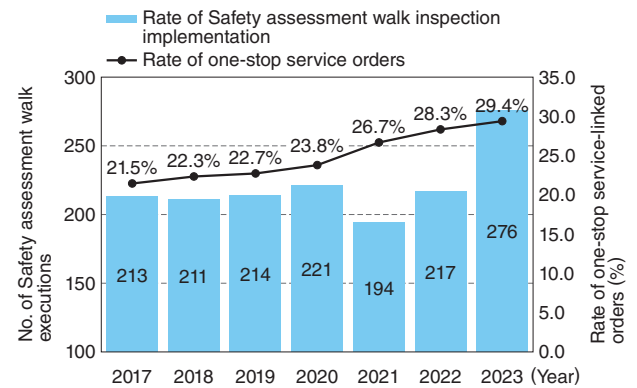
(6) Customer Targeting: This course explains various management methods and presents examples of customer targeting achieved through actual management practices.

(7) Explanation of Various Laws and Regulations: We explained the basics of the Construction Business Act and the Electrical Contractors Act that our employees should know. Furthermore, we explain laws concerning the survey and reporting of continued non-use of hazardous substances regulated by Japanese law, specifically during on-site inspections (such as Safety Assessment Walk.)

(8) Energy-saving and Decarbonization: This course explains the related key terms and the details, such as the Sustainable Development Goals (SDGs) and greenhouse gas (GHG) emission reduction. These matters are attracting attention recently. Furthermore, we explained CO<sub>2</sub> reduction methods in business activities. This method could be used in the business proposal in our one-stop service initiative campaign. **Fig. 4** shows an excerpt from the textbook used in this curriculum.

## 5 Results of Business Proposal Skills Training Program

The results of business proposal skills training



**Fig. 5 Transition of One-Stop Service Initiative**

This graph shows the number of Safety assessment walk inspection at the customer's premises, one activity of our one-stop service initiatives, and the percentage of orders linked to the one-stop service cases.

program are qualitative, i.e., the growth of younger employees, making it difficult to quantify the training's outcomes.

Instead, **Fig. 5** shows the progress of our one-stop service initiative campaign. It shows the number of Safety assessment walks conducted as part of our one-stop service initiative campaign since 2017, and the percentage of orders received as one-stop SRAC services as a percentage of our total orders. The number of Safety assessment walk inspections remained roughly flat from 2017 to 2019, prior to the proposal skills training. However, after the training program introduction, the number of Safety assessment walk inspections began to increase. Furthermore, the percentage of orders received through one-stop services has shown

steady growth since 2020.

We believe these results are the result of business proposal activities based on the knowledge gained through the training program gradually bearing fruit and leading to new orders.

## 6 Postscript

Although the business proposal skills training program, which began in 2019, had to be suspended in some years due to the COVID-19 pandemic, the training program has been held every year. Every time, there are many applicants for the course.

In addition, post-training surveys have shown a high level of positive feedback. In addition, through our efforts of making the program better and kaizen (incremental improvements) based on participant feedback, the knowledge gained from the training is now being used in the participants' actual work.

Currently, the program is being held as part of a curriculum for younger employees, but in the future, we plan to expand it to include training for mid-career employees.

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