MOOSED SALES ACADEMY · BEGINNER COURSE

PROMAX ESSENTIALS

B6 · The sixth module of the Beginner course.

Read first. Write the story. Never duplicate.

THE WALLS

SIX RULES. THEY COME BEFORE EVERY SKILL.

Every module in this academy opens with the walls, spoken in full.

Say them with me.

THE WALLS

1

1

LET THE BANKS DECIDE.

Credit is never your call. You never promise an approval.

Credit worry is answered inside this rule, and nowhere else.

THE WALLS

2

2

NO NUMBERS WITHOUT AUTHORITY.

No prices or numbers without the Chairman or the desk.

An invented number is a failure, however good the conversation felt.

THE WALLS

3

3

9 TO 7, MONDAY TO SATURDAY.

Customer-facing work runs 9 AM to 7 PM Eastern, Monday through Saturday.

Training is simulated. No live customer is a practice rep, ever.

THE WALLS

4

4

TRAINING BEFORE THE FLOOR.

You learn the units, then pass the course test at the end, before you work customers solo. Skills demonstrated, not videos watched.

THE WALLS

5

5

MODELED ON THE BEST. REPRESENTING ONLY US.

We study the best in the business and filter it through these walls.

You represent nobody but this company. No affiliation, no endorsement.

THE WALLS

6

6

THE BUYER KEEPS HIS AUTONOMY.

Urgency is a tool. Pressure past trust is a failure, not a technique.

A buyer who has clearly declined is done.

TEACH · READ FIRST

READ THE FULL RECORD BEFORE YOU TOUCH ANYTHING.

Notes, application status, appointment and visit history, active follow-up — all of it, first.

Half the mistakes on this floor are one salesman working a customer another salesman worked yesterday.

The 48-hour rule lives here: the salesman of record worked them in the last 48 hours □ it's their conversation.

TEACH · WRITE THE STORY

THE FIVE-PART NOTE.

Discovered — Said — NOT promised — Next step and its time — Owner. Every meaningful contact, immediately.

"Not promised" is the audit trail: where it's blank, somebody's promise is hiding.

Write it so a third person can work from it without asking you a question. Deals die in handoffs — the note is the handoff.

TEACH · STATUSES

STATUSES MEAN SOMETHING.

Active, and the contact-frequency statuses: Daily / Weekly / Monthly Contact.

Sold-Spotted = sold at Goshen. Delivered = sold at Fort Wayne.

A sold marker on a returning customer means a relationship, not a fresh lead: when did they buy, what did they buy, new purchase or the salesman of record's lane?

TEACH · NEVER DUPLICATE

GRID FIRST. NEVER DUPLICATE.

Before you create any record: Check Duplicates — by phone, by name, by email.

The duplicate-check grid is the authority, not a quick phone search — a fast search can miss what the grid catches.

Grid shows the customer exists → you work the existing record and its assignment. Create new only when the grid says new.

TEACH · THE CLOCK

THE 2-HOUR RULE.

A fresh lead assigned to you: logged contact in ProMax within 2 hours, or the lead can be reassigned.

Every assignment is timestamped in Eastern Time — the timestamp is what makes the clock provable and fair.

Log the contact when you make it, not at the end of the day from memory.

SAY-BACK · WORD TRACK

TRACK — SAY IT WORD FOR WORD

Discovered: [need, motivation, constraints, dominant emotion]. Said: [what was presented / the tracks used]. Not promised: [no approval, no number — or the specific limit stated]. Next step: [the step and its time]. Owner: [name].

SAY-BACK · WORD TRACK

TRACK — SAY IT WORD FOR WORD

Grid first. If he's in there, I work what's there.

DRILL — SIMULATED ONLY

Three sample records: one active deal with a salesman's fresh activity, one Sold-Spotted returning customer, one Delivered returning customer. For each: what the record says, the correct next action, whose lane it is. Then write the five-part note for a scripted conversation while your partner reads it cold.

GRADER WATCHES FOR

Full-record read BEFORE an action is named · sold markers caught, not worked as leads · the note passes the third-person test — your partner states next step, owner, and "not promised" from the note alone.

EXIT — THE STANDARD

READ ANY RECORD COLD, CALL THE SOLD MARKERS, AND WRITE A NOTE A STRANGER CAN WORK FROM.

That is the B6 standard. No exit, no B7.

The Beginner course test is at B10.