

# COMMERCIAL CHALLENGE TEAM PACK



# Hapag-Lloyd

# DEAR \_\_\_\_\_

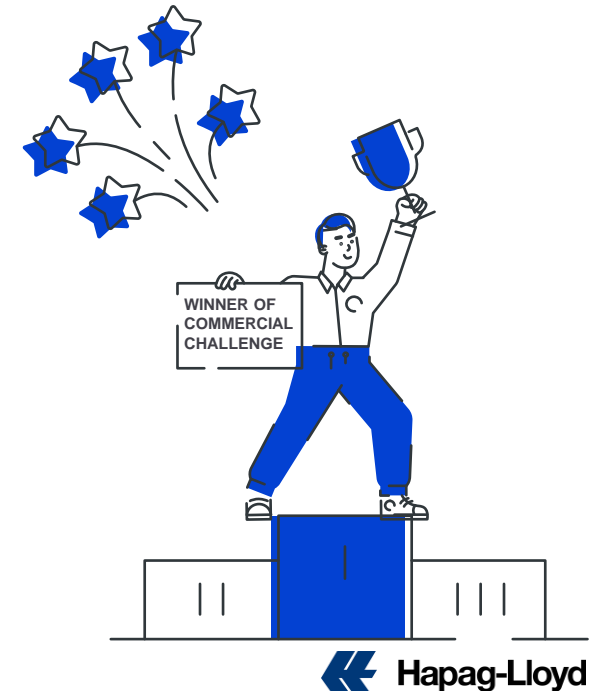
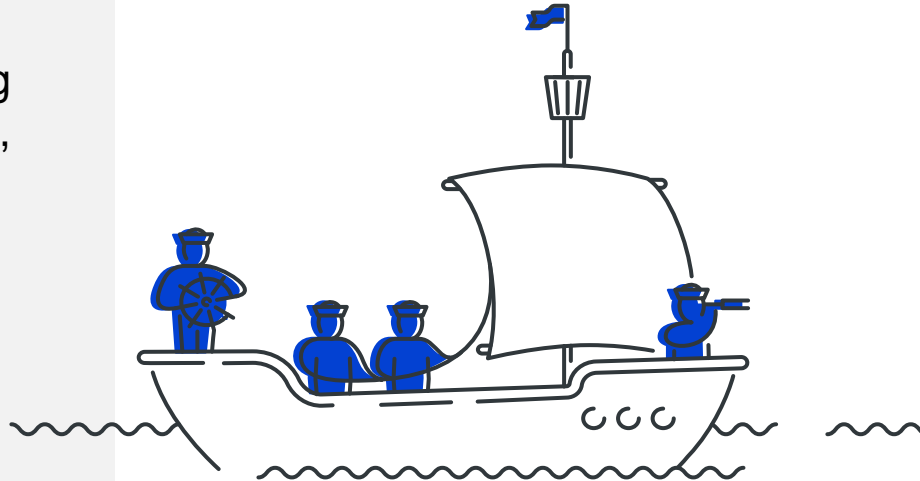
You are about to embark on the Commercial Challenge journey. Today will be busy, and you may find yourself in a challenging position at times, but that is the point.

Remember that this is a learning environment, and everyone here is committed and motivated that you will learn and succeed with the challenges ahead. This book is your guide for today. All relevant information can be found here.

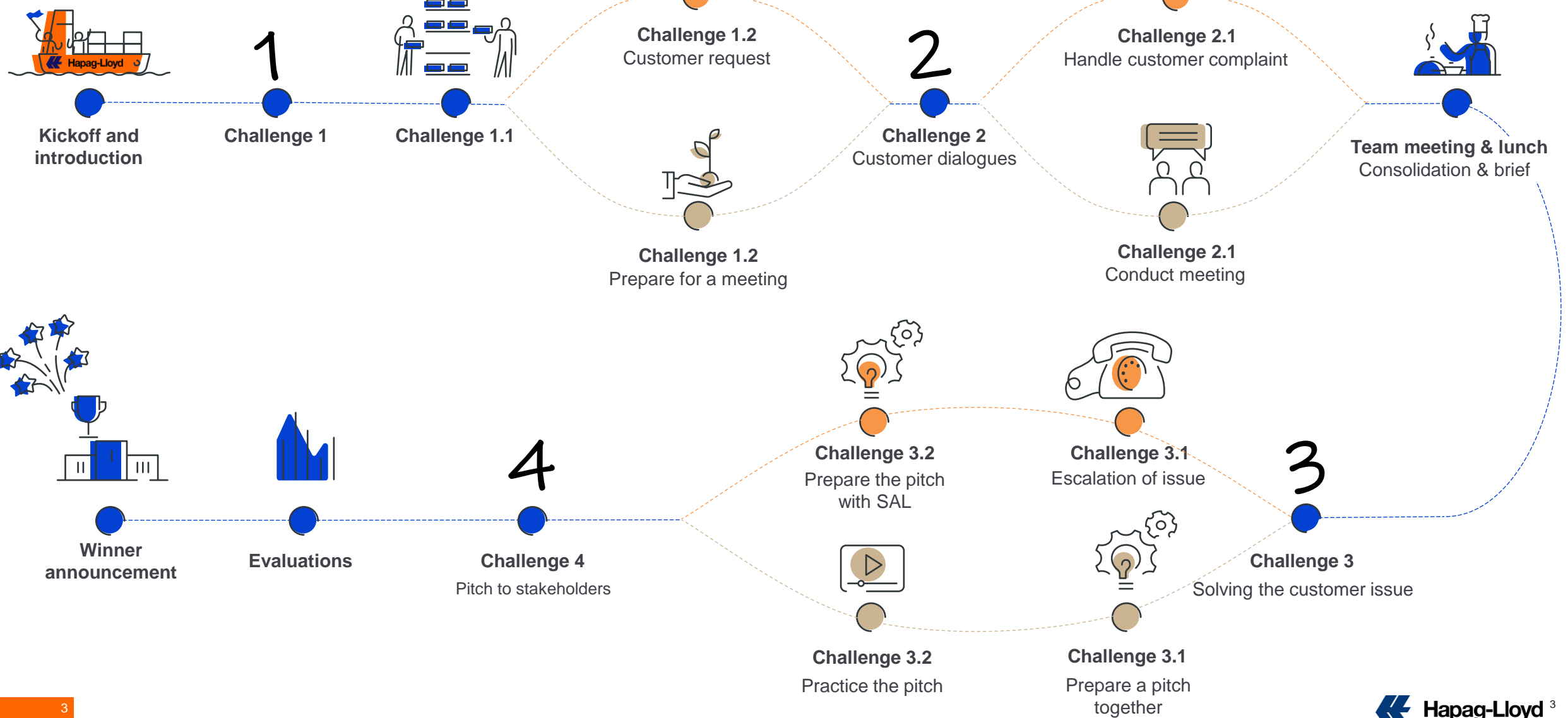
If you have any questions regarding Freightfully Yours or the challenges ahead, you can find these in the system.

Have fun.

## ARE YOU THE **WINNING TEAM?**



# Today's journey



# CHALLENGE 1: PREPARE FOR CUSTOMER COLLABORATION



## CHALLENGE 1

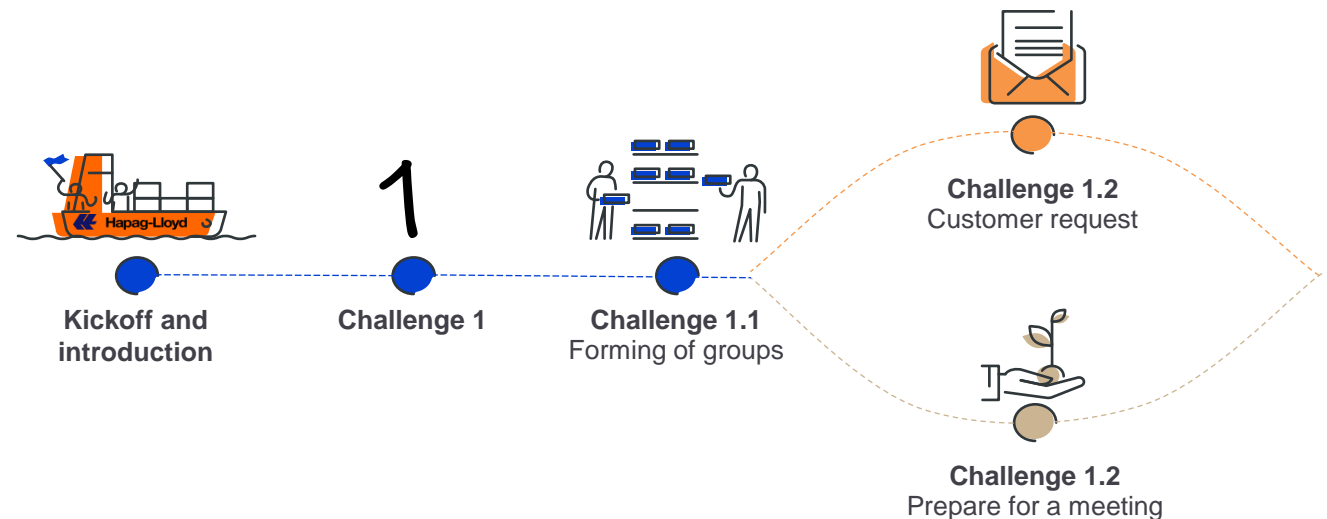
### Agenda point

Challenge 1 – Presentation of challenge

Challenge 1.1 – Forming groups

**CS Challenge 1.2**  
Answer customer complaints

**SAL Challenge 1.2** -Prepare for a meeting



# Challenge 1.1 – Forming of groups



Team  
challenge



Time  
available

## Challenge instructions

### Why?

The purpose of this exercise is to establish yourself as a team and agree on rules for how you want to collaborate and communicate during the day. This is the time to make sure you all agree on what challenges and opportunities the case presents.

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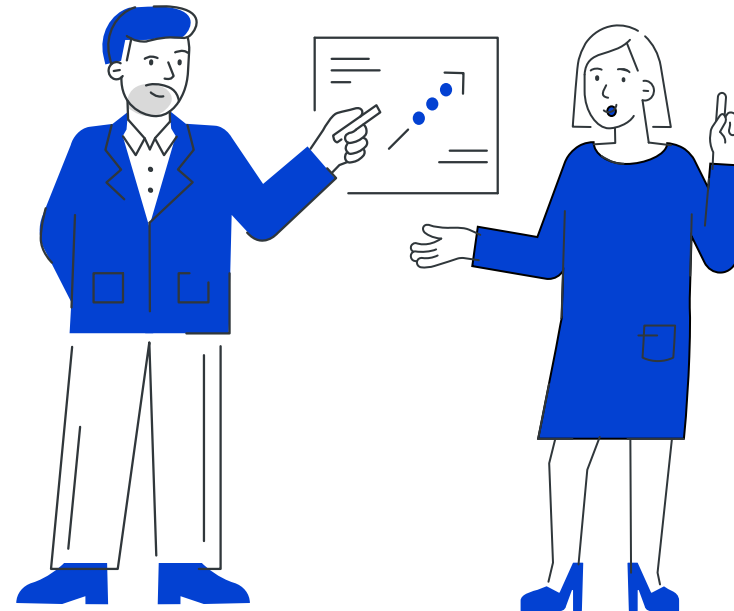
### What?

1. Come up with an inspiring team name.
  2. Each team consists of a mix of both sales and customer service. Discuss and decide on how to collaborate within your team.
  3. As a team, recap what the case is about – what are the main challenges of the case, and which opportunities does this represent for HL?
- 

### How?

Sit down together at your designated team workspace and establish yourself as a team.

# DREAM TEAM



# Challenge 1.2 – Customer request



Customer service  
group challenge



Time  
available

## Challenge instructions

### Why?

Freightfully Yours is a valued customer of Hapag-Lloyd, and they have contacted CS with an urgent request. To better maintain the quality of the goods Freightfully Yours is transporting, they have requested precooling of the reefers.

### What?

Discuss and consider how to respond to the emails from the Freightfully Yours stakeholders. Manage the issues in writing and share with the stakeholder Martina when complete.

### How?

Use the e-mail review checklist and consider the four-step model to give Martina the best possible answer. This is a great opportunity to go the extra mile and making sure you have thought through the full process of solving the customer problem fully and communicated the process to the customer.

### Received by CS Tuesday last week

**Hapag-Lloyd**  
From: Lawrence, Martin [m.Lawrence@Freightfully Yours.com](mailto:m.Lawrence@Freightfully Yours.com)  
To: Customerservice@hlag.com  
Subject: Re: BL Amendment HLCUBC1111111

**ATTENTION! This is the THIRD email I have written on this issue, and I am not able amend the booking online; please confirm AS SOON AS POSSIBLE.**

Referring to our agreement with HL. I have been informed the temperature setting on the reefer containers are too high, and that this might cause deterioration to the quality of the **goods**. We need to change the temperature to -2 degrees and ensure containers are pre-cooled.

/Martin Lawrence  
Logistics Coordinator

### Received by CS Friday last week

**Hapag-Lloyd**  
From: Frey, Martina [m.Frey@Freightfully Yours.com](mailto:m.Frey@Freightfully Yours.com)  
To: Customerservice@hlag.com  
Subject: Service Issues

Hey,

Following up on a message sent by my colleague Martin earlier this week. I have been informed of recurrent delays in response from your team along with a request to change temperature setting on our containers. it is at this point particularly important to get a quick response showing commitment from you on our cargo being important to Hapag-Lloyd.

Kindly respond with your suggested solution to this recurrent problem.

Regards,  
Martina Frey  
Supply Chain Manager  
Freightfully Yours

# Email review checklist



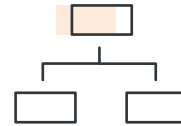
**Use an appropriate greeting**



**Avoid using HL language and abbreviations**



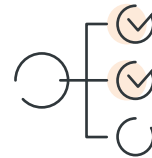
**Get straight to the point – based on the facts**



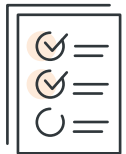
**Use headlines – use the subject**



**Beware of quick text**



**Use bullet points**



**Use correct punctuation, grammar and spelling**



**Address to the TO and be aware of cc**



**Be helpful**



**Use a professional and polite tone**

# Challenge 1.2 – Meeting Preparation Sheet



Sales group challenge



Time available

## Challenge instructions

Based on the insights provided by your former colleague Alex, you decided to reach out to Freightfully Yours. This is a must-win opportunity and, therefore of high priority.

The account plan for Freightfully Yours has been created, so you browse through the plan for any useful insights that could improve the potential outcome of the meeting. Furthermore, you visit Freightfully Yours website to read more about the company.

Lastly, you visit some of the key stakeholders' LinkedIn pages to ensure that you have gathered as much information as possible. Your task is to prepare for the upcoming meeting with the stakeholders.

You must use the Meeting Preparation Sheet to document the various elements you will bring to the meeting. Share your Meeting Preparation Sheet with your team for them to provide feedback to you.

## Tips and tricks

Here are a couple of things that you can consider before your sales meeting:

- What are the potential/possibilities for the customer?
- What is the desired outcome/most optimal outcome of the meeting? For both parties.
- What is the current customer experience? Any ongoing issues?
- What levers do we use? (how will we develop the Freightfully Yours account, and how do we increase our Share of Wallet with, e.g., 10 percentage points?)
- What are the Pain Points of the stakeholders?
- Which reference story will you tell, and why is it valuable for the customer?
- Prepare 3-4 key open-ended questions to ask during the sales meeting.
- How do we, as a company, differentiate ourselves from other freight carriers?



# A good start is half the battle

TOOLS CAN BE FOUND ON THE FOLLOWING PAGES





# Challenge 1.2: Meeting Preparation Sheet – template



Customer/prospect name:

Name & Title :

Sales rep name:

Meeting date :

SMART meeting objective:

## MEETING AGENDA

## REFERENCE STORY

## CUSTOMER PAINS

## EXPECTED SOLUTION

## STAKEHOLDERS INVOLVED

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## Meeting objective / goal

A standard way of phrasing your objective for this particular meeting – Be Ambitious!



Specific



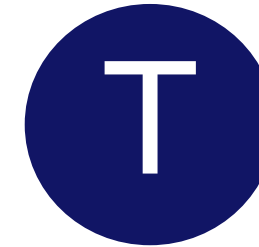
Measurable



Achievable



Relevant



Time-based

### EXAMPLE 1

My objective of this meeting is to agree on 500 40" containers on the trade from Shanghai to Rotterdam with the first booking arriving August 1<sup>st</sup>

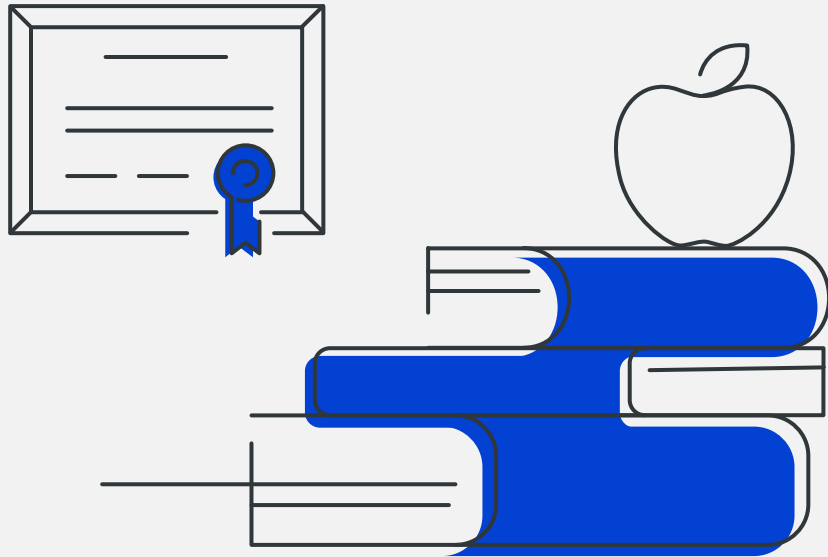
### EXAMPLE 2

Secure access to the key decisionmaker latest by August 1<sup>st</sup>

### EXAMPLE 3

To identify customer pains, requirements in regard to volume of TV sets moving from Seoul to US West Coast and secure follow-up meeting no later than August 1<sup>st</sup>

# CHALLENGE 1: EVALUATION



## FOUR ELEMENTS

We will evaluate your performance based on four main elements

### CS COMMUNICATION

High scores will be awarded to teams who applied the learnings from the training e.g., clearly used the e-mail review checklist and applied the extra mile mindset to make the customer service experience exceptional.

### SMART GOALS

High scores will be awarded to teams with realistic and measurable meeting objectives.

### FIND SOLUTION

High scores will be awarded to teams who are able to find a sustainable solution that will exceed the customer expectations by thinking through the full CS process to ensure the customer request is met fully.

### MEETING PREPARATION

High scores will be awarded to teams based on their preparation sheet. A clear agenda, pain points, a solution in mind, and a consideration around stakeholder involvement is of great importance.

# CHALLENGE 2: CUSTOMER DIALOGUES



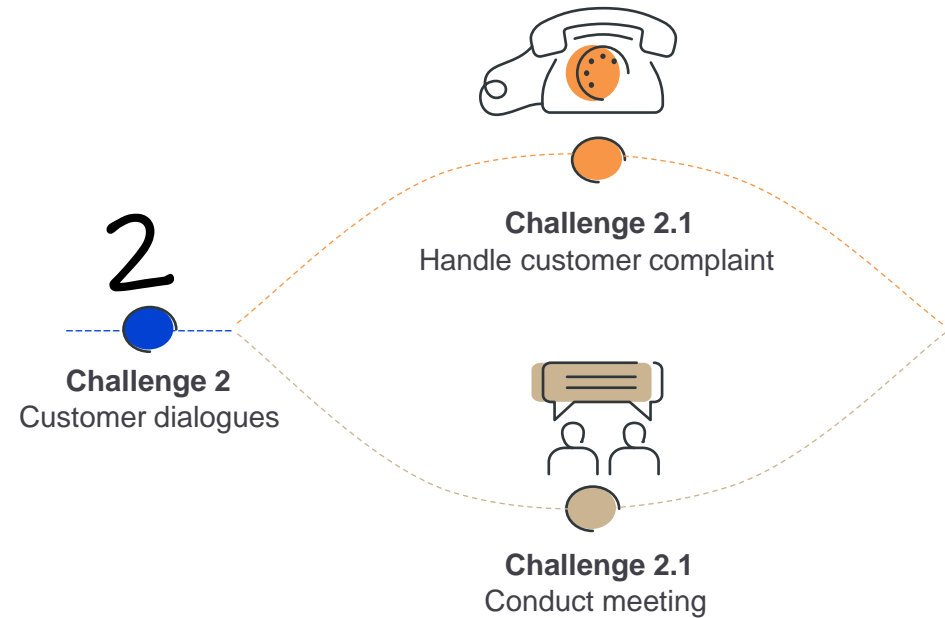
## CHALLENGE 2

### Agenda point

Challenge 2 – Presentation of challenge

**CS Challenge 2.1**  
Handle customer complain

**SAL Challenge 2.1** Conduct meeting



# Challenge 2.1 – Customer Service

## Handle customer complaint



Customer service  
group challenge



Time  
available

### Introduction



- Martina from Freightfully Yours has become aware that Hapag-Lloyd is pitching on Freightfully Yours volumes.
- Martina will call you to discuss an issue on the current Hapag-Lloyd lanes, which has been pointed to in the previous e-mail.

### Challenge instructions



1. Use the time overview to find the timeslots for the phone conversations. The stakeholder's location will be placed on the information board.
2. Conduct the client conversation:  
Complete a role-play:
  - A manager will act as Martina from Freightfully Yours.
  - This is a conversation and not a formal presentation. You should be open and friendly during the meeting.
  - Make sure to include relevant elements you learned during the customer service training.

### Tips and tricks



Here are a couple of things that you can consider before the conversation with the client:

- How will you establish rapport?
- Which elements can you touch upon to show acknowledgment to the customer?
- What open-ended questions will you ask?
- What is the customer trying to achieve, and which solution can you provide to help them? Consider informing Martina about the process for solving this issue going forward.
- How can you go the extra mile?
- What are important things to note down for the wrap-up?

Remember to **listen actively**.

# Challenge 2.1 – Sales

## Conduct sales meeting



Sales Group  
challenge



Time  
available

### Introduction



- In Hapag-Lloyd, we want to perfect the art of *sales meetings*.
- In these meetings, we have the chance to investigate and uncover the customer's business challenges and Pain points.
- As part of the customers buying process, we have been invited to meetings with two key stakeholders.
- The purpose of these meetings is to ask questions to understand the company's and the stakeholder's Pains and needs.
- We advise that you use the Mountain Model for a structured customer dialogue.

### Challenge instructions



1. Use the time overview to find the timeslot for the sales meeting. The stakeholder's location will be placed on the information board.
2. Conduct the sales meetings: Complete a role-play:
  - One of your managers will act as a senior executive from Freightfully Yours.
  - This is a conversation and not a formal presentation. You should be open and friendly during the meeting.
  - The group decides who will attend the meeting. Remember to provide some feedback to your colleagues after the meeting.

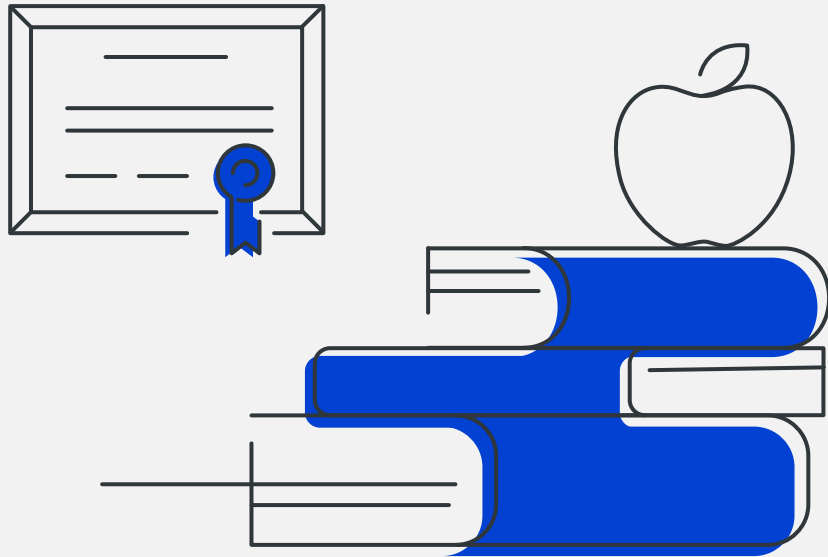
### Tips and tricks



Here are a couple of things that you can consider before the meeting with the stakeholder:

- Spend your time wisely and come well prepared. Remember, you are competing against other carriers (and even your colleagues).
- Think about using open-ended questions to increase the probability of understanding the real pains of the customer.
- Clarification – discuss the impact & consequences of Freightfully Yours current situation – you have to give the stakeholder good reasons to choose you.
- Remember – Do not take the “death route on the Mountain model”... diagnose before you prescribe 😊

# CHALLENGE 2: EVALUATION



## FOUR ELEMENTS

We will evaluate your performance based on four main elements

### CS COMMUNICATION

High scores will be awarded to teams who applied the learnings from the training e.g., clearly used the four-step model and applied the extra mile mindset to make the customer service experience exceptional.

### STRUCTURE

High scores will be awarded to teams based on their ability to structure the meeting with a clear link to what was prepared in the Meeting Preparation Sheet.

### ACTIVE LISTENING

High scores will be awarded to teams with the best active listening skills demonstrated across interactions.

### MEETING SKILLS

High scores will be awarded to teams who asks great questions followed up by double clicks. Furthermore, the ability to build trust with the stakeholders.

# Team meeting and lunch



Team  
challenge



Time  
available

## Instructions

### Why?

Congratulation! You have now solved 2/4 main challenges.

You have gathered again as a team, and it is your job to ensure that everyone is updated on recent developments in the case so everything is clear and correct.

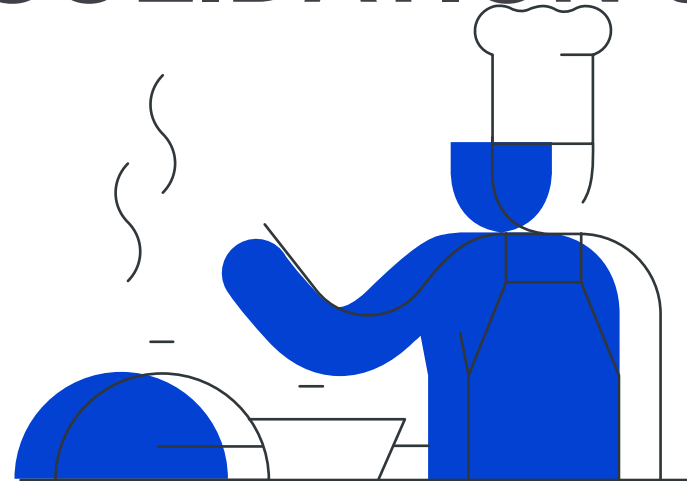
### What?

1. During lunch, make sure all relevant information you have obtained in the Sales and Customer Service groups is handed over to the entire team.
2. Revisit the discussion you had this morning regarding how you planned to collaborate within your team. Evaluate how you are doing with this so far. Is it working? Are any changes necessary regarding your collaboration for this afternoon?

### How?

Sit down at your designated team workspace and ensure everyone is up to speed while you enjoy your lunch.

# TEAM CONSOLIDATION & BRIEF





# CHALLENGE 3: SOLVING THE CUSTOMER ISSUE



## CHALLENGE 3

### Agenda point

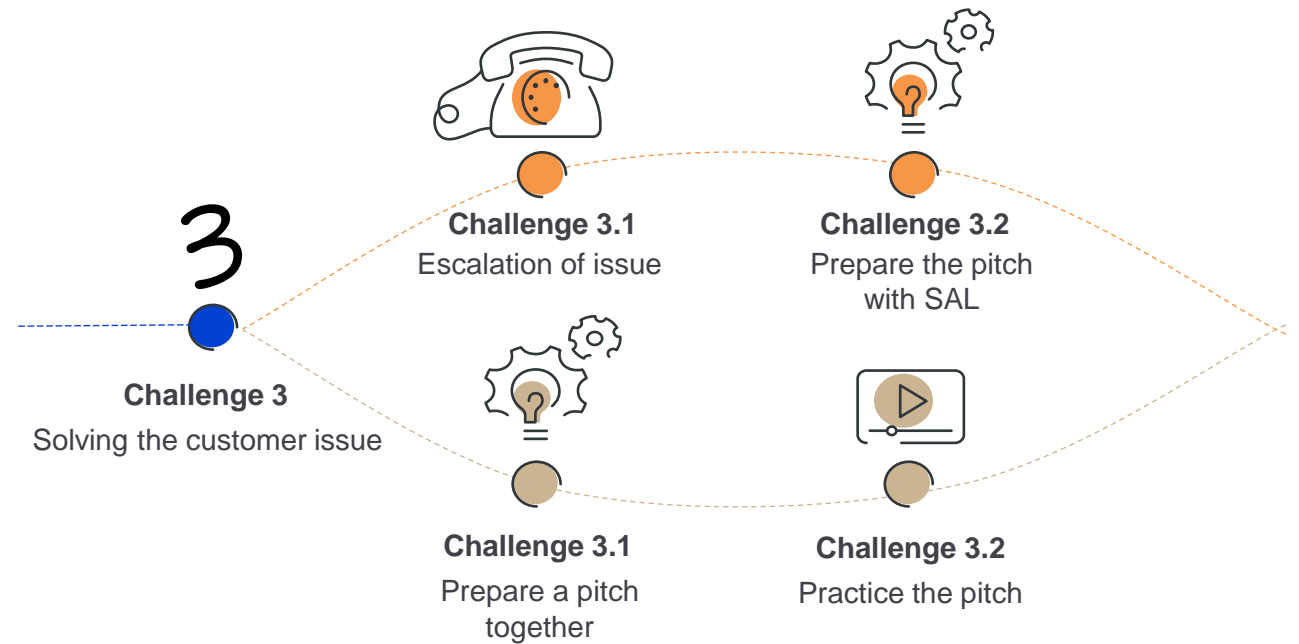
#### Challenge 3 – Presentation of challenge

**CS Challenge 3.1**  
Escalation of issue

**SAL Challenge 3.1**  
Prepare a pitch together

**CS Challenge 3.2**  
Prepare the pitch with SAL

**SAL Challenge 3.2**  
Practice the pitch



# Challenge 3.1 – Escalation of issue



Customer service  
group challenge



Time  
available

## Introduction



- Two weeks have passed since you talked on the phone with Martina from Freightfully Yours, but things have escalated in the main time.
- Martina will call you for a conversation around continuing issues regarding cargo continuously not loaded as booked on their current Hapag-Lloyd lanes and wants to discuss a solution for how to handle the process in the future to ensure no more issues occur.

## Challenge instructions



1. Use the time overview to find the timeslots for the phone conversations. The stakeholder's location will be placed on the information board.
2. Conduct the client conversation:  
Complete a role-play:
  - A manager will act as Martina from Freightfully Yours.
  - This is a conversation and not a formal presentation. You should be open and friendly during the meeting.
  - Make sure to include relevant elements that you have learned during the customer service training.

***NB!*** After your phone call with Martina, proceed to Challenge 3.2. right away.

## Tips and tricks

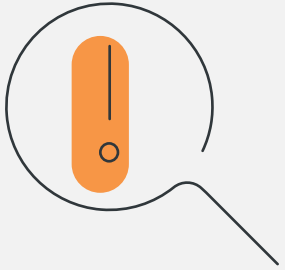


Here are a couple of things that you can consider before the conversation with the client:

- How will you use this opportunity to strengthen rapport?
- Which elements can you touch upon to show acknowledgment to the customer?
- What open-ended questions will you ask to gain more insight into the issue?
- Which solution can you provide to reassure Martina that HL is the right long-term partner for them? How can you go the extra mile?
- What are important things to note down for the wrap-up?

Remember to **listen actively**.

## Wrap it up in a professional way



**Summarise the solution**

*'Here is what you can expect'*



**Offer further assistance**

*'Is there anything else I can do for you regarding this case?'*



**Close with courtesy**

*'I appreciate your call... have a great day'*

# Challenge 3.1 – Preparation for the customer pitch



Team  
challenge



Time  
available

## Introduction



- In executive-level meetings, executives ask themselves questions: Do these people know my business? Can they help implement my strategy or solve my problem? And do they have credibility, and can I rely on them?
- The time for the Freightfully Yours pitch has come, and consequently, you will need to prepare the meeting thoroughly. Remember that the pitch's purpose is to underline your service's VALUE.
- In pitching Hapag-Lloyd as an ideal partner, it is important you understand the customer business, pains, and current level of engagement with Hapag-Lloyd and their customer service experience.
- Make sure the customer pitch considers both Hapag-Lloyd's ability to support them in the future and our current engagement and service.

## Challenge instructions



Prepare a 10-minute pitch in which you consider the meeting setting, the individual roles, what materials you want to apply in the presentation, and what insights fit with what you have learned about Freightfully Yours.

Make sure to take their existing Customer Service Experience into account. This is not just a sales pitch; it is an existing customer whose experience with Hapag-Lloyd's service can make or break the deal.

## Tips and tricks



Here are a couple of things that you can consider before your pitch:

- To grow an existing account, a salesperson needs accurate account strategies, insights, in-depth customer knowledge, and strategic business understanding.
- An existing account depends highly on the current level of engagement of the customer, so understanding ongoing issues and how they are being addressed is highly relevant
- Align the Pain Points of the customer with your applied insights.
- Have a clear designation of roles, to ensure that the presentation flows naturally.
- Consider the communication tools which you will apply, and their alignment with what you are trying to say.
- Make sure you understand any ongoing issues and how you plan to solve them. Both sales and customer service should contribute to the pitch.

# Challenge 3.2 – Practice the customer pitch



Team challenge



Time available

## Challenge instructions

### Why?

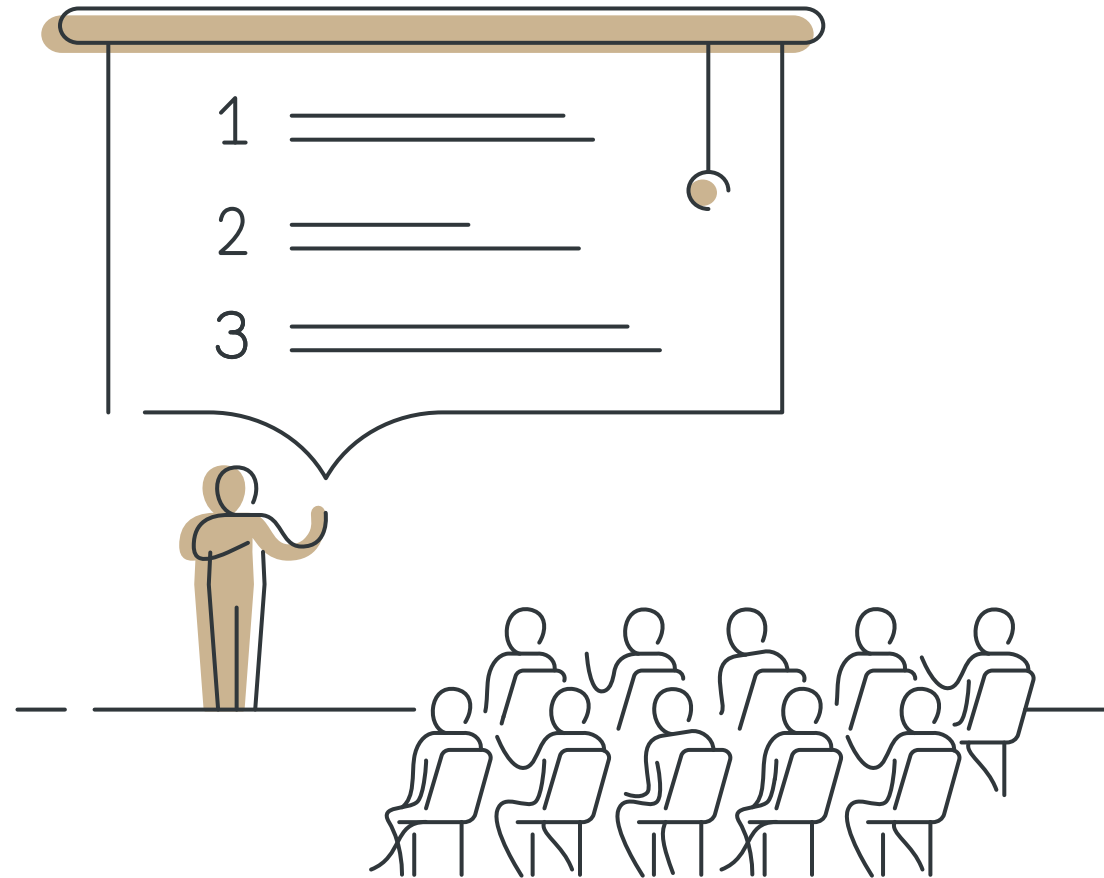
Everyone can make a PowerPoint presentation, yet that is not a prerequisite for a good pitch. Pitches improve significantly when we rehearse them.

### What?

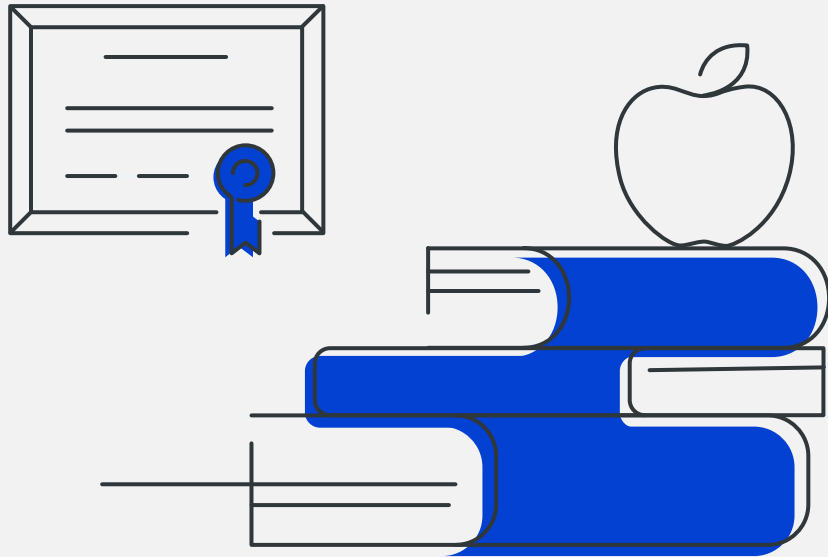
The team member(s) who will conduct the customer pitch ought to prepare it. Practice the pitch for 20 minutes.

### How?

Present the customer pitch to the rest of the team or ask someone else if you can use them as stakeholders. Once you have presented your pitch – ask for feedback.



# CHALLENGE 3: EVALUATION



## FOUR ELEMENTS

We will evaluate your performance based on four main elements

### ACTIVE LISTENING

High scores will be awarded to teams with the best active listening skills demonstrated across interactions, as well as their ability to sum-up the conversation and next steps in a clear way.

### PREPARATION SKILLS

High scores will be awarded to teams who displayed great commercial collaboration in the preparation process and ensured that all relevant information was shared between CS and SAL.

### FIND SOLUTION

High scores will be awarded to teams who are able to find a sustainable solution that will exceed the customer expectations by thinking through the full CS process to ensure the customer request is met fully.

### CUSTOMER PAINS

High scores will be awarded to teams who prepare their presentation with a structure that makes it relatable for the stakeholders, covering elements from the meeting and other important topics

# CHALLENGE 4: PITCH TO STAKEHOLDERS



## CHALLENGE 4

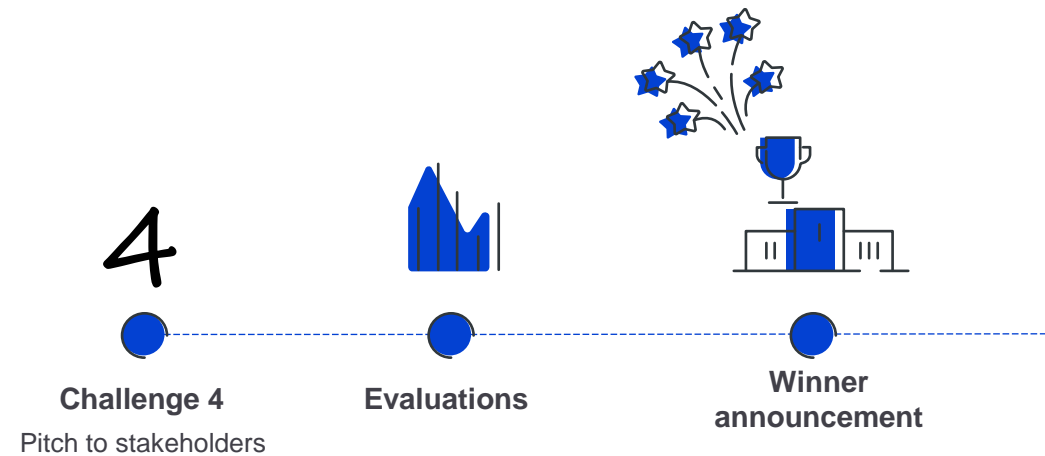
### Agenda point

Challenge 4 – Presentation of challenge

Challenge 4 – Pitch to stakeholders

Evaluations

Winner announcement



# Challenge 4: Presentation of the pitch



Team  
challenge



Time  
available

## Introduction



The time has come for your pitch to the Freightfully Yours stakeholders. For all your hard work and preparations to bear fruit, you must consider both the setting of the meeting, how & what you emphasize on your value proposition, and what impact this has on Freightfully Yours.

## Challenge instructions



Conduct a maximum 10-minute pitch that you will present to the stakeholders of Freightfully Yours.

Pitch timings can be found on the information board.

## Tips and tricks

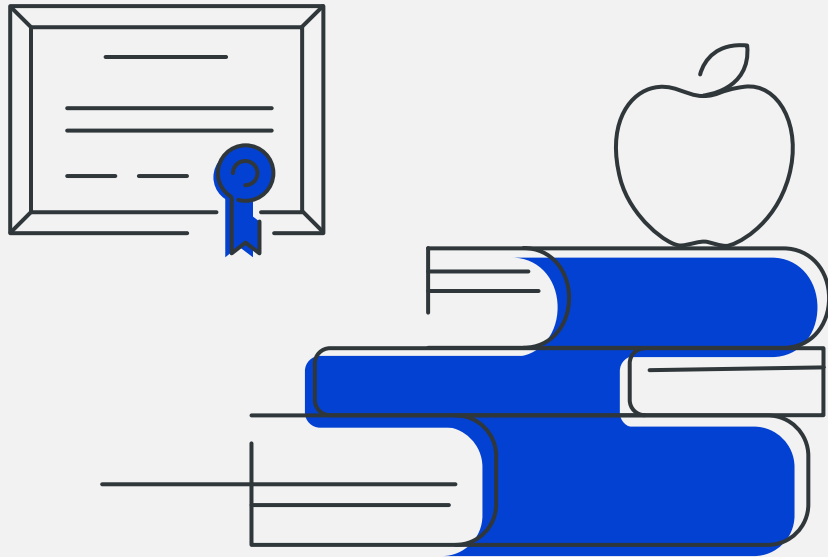


**Here are a couple of things that you can consider before your pitch:**

- The pitch is conducted face to face. Therefore, consider how you can make the presentation engaging and memorable.
- Show that you understand Freightfully Yours business and that you understand the key Pain points and that you can quantify these.
- Make sure you are aware of the issues and service expectations and how we are addressing them in our current partnership, as well as the plans to address them in the future
- Exhaust the impact of the value Hapag-Lloyd can create for Freightfully Yours.
- Senior executives are eager to learn how you can create value for them, but also that you demonstrate that you can solve the current issue they are experiencing. Remember to spend adequate time addressing the issues they have experienced.



# CHALLENGE 4: EVALUATION



## GREAT JOB SO FAR!

We will evaluate your performance based on four main elements.

### PRESENTATION SKILLS

High scores will be awarded to teams who managed to make the pitch engaging, memorable and followed a natural flow.

### UNDERSTAND THE CUSTOMER

High scores will be awarded to teams who showed that they understood Freightfully Yours business and their challenges as well as their service needs.

### ABILITY TO BRING VALUE

High scores will be awarded to teams who managed to articulate and show the value of their proposed solution(s) and reassure the stakeholders that all the issues raised on CS calls will be handled going forward.

### POSITION HAPAG-LLOYD

High scores will be awarded to teams who managed to position Hapag-Lloyd as the carrier to choose for the future. Hapag-Lloyd should be positioned as a commercial and engaging service partner.