Special Management Series

8 Steps to a Successful Sales Call

This is a series of Training for your Management TEAM

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A Management Perspective 303 Series

Management - JWO 364

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From preparation to closing, remember to make these key moves.

It's always good to have a plan for your sales visits that can serve as a quick reminder of the essentials.

You can use this checklist as a review before and after each sales call to make sure you cover all the bases. Leaving a sales call and wishing you had remembered to ask a specific question or show the prospect another product idea is a horrible feeling; using this checklist may help you avoid that. (Edit this list based on the type of sales cycle you're involved in.)

Sales Call Checklist

8 Steps to a Successful Sales Call

1. Preparation Prior to Sales Call

Did I:

- Research the account prior to the call?
- Learn something about the person and their business before the meeting?
- Send an outline of the agenda to the client before the meeting?
- Have three value-added points prepared?
- Bring all materials, brochures, contracts, etc.?
- Answer the three important pre-call questions:
  A. What is the goal of the call?
  B. What do I need to find out during the call?
  C. What's the next step after the call?

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2. Greeting and Introduction

Did I:

- Observe the prospect's office décor (e.g., trophies, awards, pictures and so on)?
- Find out about the prospect's personal interests, hobbies, family and so on?
- Find out the names of contacts in the account and write them down?
- Bridge to the business topic smoothly?
- Listen more than I spoke? (Ideally, you should spend 80 percent of your time listening and only 20 percent talking.)
- Ask the customer about their business goals?
- Ask the customer what challenges the company is facing?

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3. Qualifying

Did I:

- Find out who the decision-makers are by asking "Who else besides yourself might be involved in the decision-making process?"
- Ask what process they normally go through when considering a new vendor?
- Find out how and why they made the decision for their current product or service (assuming they are replacing a product or service)?
- Find out what their time frame is?
- Find out if funds have been allocated--and how much?
- Find out their specific needs?
- Ask if they could change something about their product or service, what would it be?

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4. Surveying

Did I:

- Ask open-ended questions (who, what, where, when, why, how, how much, tell me about it, describe for me)?
- Ask about the corporate structure?
- Ask about the prospect's role at the company?
- Ask what's important to them?
- Ask what's interesting to them and then focus on that?
- Ask what risks they perceive?
- Ask how we can help solve their problems?
- Ask what they think about our company?

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4. Surveying - cont.

Did I:

- Ask what they like and dislike about their current vendor?
- Ask how industry trends are affecting them?
- Ask "what if?" questions?
- Ask what they would like to see from a vendor and salesperson in the area of support after the sale?
- Ask what their short-term and long-term goals are?
- Ask how I can become their most valued vendor?
- Ask what is our next step?
- Establish a specific follow-up schedule?
- Parrot the prospect to encourage him to expand, elaborate and go into detail about each answer?

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5. Handling Objections

Did I:

- Listen to the entire objection?
- Pause for three seconds before responding?
- Remain calm and not defensive?
- Meet the objection with a question in order to find out more?
- Restate the objection to make sure we agreed (communication)?
- Answer the objection?
- Complete the six-step process?
  1. Listen
  2. Define
  3. Rephrase
  4. Isolate
  5. Present solution
  6. Close (or next step)

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6. Presentation

Did I:

- Prioritize the prospect's needs?
- Talk about benefits to the customer?
- Use layman's terms?
- Link the benefit to the prospect's needs?
- Verify each need before moving on?
- Present myself, company and product in a positive light?
- Re-establish rapport?
- Ask if anything changed since our last meeting?
- Pre-commit the prospect?
- Give a general overview of the product or service?
- Keep the presentation focused on the customer's needs?
- Involve the customer in the presentation?
- Summarize the prospect's needs and how our product or service meets those needs?

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7. Closing

Did I:

- Get the customer to identify all possible problems that might be solved by my product or service?
- Get the customer to identify the value of solving the identified problems?
- Get agreement that the proposed solution provides the values identified?
- Ask for the order ("Why don't we go ahead with this?")?

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8. Customer Maintenance

Did I:

- Write thank you letters for appointments, orders and so on?
- Earn the right to ask for reference letters and referrals?
- Establish a schedule for follow-up calls and customer visits?
- Ask for referrals *("Do you know three people who could benefit from my product and service like you did?")?*
- Send thank you notes to lost accounts?
- Ask what are three important things we can do as a vendor to keep our relationship strong?

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This checklist will help you stay focused.

Every time you schedule a sales call, run through this list before-hand to make sure you're prepared--and after the visit to see what you can do next time to make the call run more smoothly and increase your chances of success.

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Good Selling !

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