FACE TO FACE SELLING SKILLS

MODULE 4 – PREPARATION FOR THE SALES CALL

Pre-Tutorial

ACCOUNT MANAGER'S WORKBOOK

KEY ACCOUNT MANAGEMENT

Welcome to Module 4 – Preparation for the Sales Call

Welcome to Module 4 of Face to Face Selling Skills. In this Module we shall explore the critical aspect of meeting preparation.

Most of us are familiar with the adage – "failing to prepare is preparing to fail" yet every year customer research conducted by different independent organizations tells us that many customers complain that sales people who visit them are not properly prepared. Poor preparation is one of the most frequent customer complaints.

So this Module will discuss the four core aspects of preparation for the sales call. We shall consider defining the purpose of the sales meeting and setting your objectives, doing research on the customer, anticipating the customer's situation and finally planning the call itself.

This WorkBook contains the preparatory work for the Group Tutorial.

When you are ready to start, turn to the next page and the first Task.

Topic 1 – Are we properly prepared?

Watch the first video in Module 4 – “Preparation for the Sales Call – Introduction”. This video discusses why not every sales person is always fully prepared and outlines the content for the rest of the Module.

Then answer the following question:

If you are honest with yourself, how much preparation do you do for the sales call?

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In particular what will you normally prepare?

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What questions will you seek to address in your preparation?

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Task 1 – What is the point of this sales meeting? The call objective

You recall one of the common mistakes we looked at in Module 3 was the sales person who was not clear on why the meeting was being held. This is a common issue for sales people who have been visiting a customer for some time. They assume they now know everything and the meeting becomes routine.

Now watch Video 2 from Module 4 (M4U2) Setting the Call Objective. It discusses the call objective.

Do you have a mnemonic for setting objectives?

If so what is it?

………
………
………

If not use the following:

SMAC

Using this mnemonic the objective must be:

Specific – you know exactly what it means

Measureable – you can measure success a clear measure – for example, number of boxes to be sold, information to be gained, and so on within a defined time

Achievable – it is possible to do this within the time

Compatible - with what your company wants you to achieve

Example 1 – I will gain agreement for one pallet of the new widget at 5% introductory discount to be delivered this week – I believe that this product is right for the customer and my company wants me to focus on getting distribution for the new widget

Example 2 – I will identify the decision maker for the category and agree to meet with person within the next four weeks – I should be able to do this because I shall meet a good contact and my company wants to move into the new category so I must find out who is responsible

Topic 1 - The call objective

Self-reflection exercise

Think about your next sales call
Set your objective for this call.

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Topic 2 – Essential research for the call

Now watch Video Unit 3 in Module 4 (M4 U3) which will discuss the important aspect of research.

The level and amount of research you do for the sales call will depend on the specific situation. We can identify four core research areas for almost every call you make – the company, the individuals, the market or industry and the history of the relationship.

Now consider a forthcoming customer visit and define the research you must do using these four criteria – use the following sheet as a prompt.

Pre-call Research summary

Name of the customer:
Objective of the call: To

Information I need before the call:

Customer's company
……
……
………..
The individuals I will meet
……
……
………..
The market or industry
……
……
………..
The history of the relationship
……
……
……….

Topic 3 – Anticipation and expectation

Now watch Video 4 in Module 4 (M4U4) Anticipation and Expectation which discusses the importance of anticipating what is likely to happen during the call and being ready for it.

Now think about your next customer visit – what is the customer's expectation for this meeting?

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………

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………

……

How will the customer measure the success of this meeting?

………

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……..

What do you want the customer to do as a result of this meeting?

………

………

………

……..

How will you do this?

………

………

………

……..

Topic 3 – Anticipation

Using the same example from the last exercise – what attitude and opinions does the customer have?

About you and your company?

……

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About your competitors?

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About their market place?

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About their own customers?

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What does this mean for you in terms of how you should plan the call?

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Topic 4 -Explaining the ideas - Preparation for the Tutorial

The best way to ensure that you fully understand a topic is to explain it to someone else. Please be ready to explain the following at the Tutorial…

What do you need to prepare for the sales call?

………

………

……

What should you anticipate?

………

………

………

How do you set an objective?

………

………

………

Topic 5 – Preparing for the call

Now watch Video 5 in Module 4 – (M4U5) which introduces the idea of the meeting agenda.

Next step

Now that you have completed all of the pre-Tutorial work, we will look forward to seeing you at the next group session.

FACE TO FACE SELLING SKILLS

MODULE 4 – PREPARING FOR THE SALES CALL

Post-Tutorial

ACCOUNT MANAGER'S WORKBOOK

Post Tutorial Work Book

Welcome to the second part of the Module 4. This Work Book covers the post-Tutorial activity.

When you are ready to start, turn to the next page and the first Task.

Topic 1 – Preparing for the sale call

Individual Task – part 1

Select your most important customer visit in the coming two weeks and prepare for this visit:

What is the call objective?

………

………

……

What is the customer's objective and expectations?

………

………

………

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………

What information do you need to research?

The company

………

……..

The individuals

………

……..

The market or industry

………

……..

The history of the relationship

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……..

What core questions will you ask?

………

………

………

………

Topic 2 – The call agenda
Individual Task – part 2

Now summarise this planning using the call planning form

Customer Meeting Planning Form			Month		Name	
Customer	Date	Where	Who	Title		
Main Objective of the meeting						
1 To…						
Research to be done						
Company						
Individuals						
Market						
History						
Expectations and anticipation						
Customer's objective						
Customer's attitude						
I can anticipate						
My core questions						
My agenda						
Introduce by						
then						
then						
then						
Close by						

Topic 3 – Call preparation - Buddy Task

Now you have a clear understanding about the preparation necessary of the sales call.

Consider the following questions – then make a time to review your answers with your Buddy:

What else could I prepare?

……
……
………..

Is there anything I would change on the preparation sheet?

……
……
………..

What is the most important thing I have gained from this Module?

……
………..
………..

Topic 4 – Call preparation

Assessed Task

Present your call preparation summary to your Line Manager.

Topic 4 – Call preparation - Assessed Task – Line Manager's Review

Having reviewed the results of the Assessed Task on Call Preparation, are you satisfied that the Sales Person:

Has clarity about the call objective?	**Yes/No**
Has done the right level of research?	**Yes/No**
Has anticipated the likely customer attitude and needs?	**Yes/No**
Is fully prepared to conduct this sales call?	**Yes/No**

Comments:

……

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………..

Signed: Name: Position:

Topic 5 – Your online profile – Buddy task

The customer is likely to do research on you especially if he or she is recommending that you speak with another colleague. It is important that your online profile meets the customer's expectations. Some sales people have inappropriate or out of date profiles on Linked In and other social network sites.

Buddy Task

Ask your Buddy to search your profile online and review your profile. Ask your Buddy to answer the following questions:

Is this profile professional?

Does the profile match the individual?

What could be done to improve the profile?

Module 4 - Key Points Summary

Use this summary to remind yourself about the key points in this Module – note any point which is not clear and raise this at the next Group Tutorial

- **Preparation is one of the most important steps yet also the most neglected**
- **The most effective sales people are the best prepared**
- **Similarly those sales people in whom the customer has the least confidence are generally poorly prepared**
- **Every sales visit must have an objective which is clear and specific**
- **You must research the customer, the market, the people and the history of the relationship**
- **Ensure your online presence is compatible with your desired image**
- **Anticipate what the customer wants from the meeting, what he/she will do and say and how you should respond**
- **Have an agenda for the meeting either written down or clearly in your mind**
- **Plan the way you will open the meeting**
- **Plan the questions you want to ask and the way to ask them**
- **Plan how you will close the meeting**

My Capability Scorecard

Complete the Scorecard for Module 4. Identify any issues which need further development. You can discuss these in the next Group Tutorial if you would like input from the Group or with your Group Buddy, your Line Manager or by booking a one-to-one coaching session with a Group Coach.

CAPABILITY BEST PRACTICE SCORECARD - SELLING SKILLS MODULE 4 SALES CALL PREPARATION				
	This Scorecard defines the Best Practice for Module 4 of the Face to Face Selling Skills Program – Sales Call Preparation. Having completed the Module, each Delegate should be able to answer 'Yes' with a high confidence level for each of the 10 Best Practice Criteria			
	Best Practice Component	**Yes/No**	**My confidence level (1-10)**	**Is there anything I must do to improve this?**
1	I can explain the dangers of not preparing properly for the call			
2	I can explain how to set call objectives			
3	I always define exactly the purpose and my expectation of the meeting			
4	I anticipate the customer's expectation during the planning stage			
5	I can explain what research should be done about the customer			
6	I research the people I will be meeting and prepare a relevant introduction			
7	I realise that the customer will research me and my online profile reflects the right image			
8	I anticipate and prepare for the customer's likely behaviour during the meeting			
9	I can explain how to write a call agenda			
10	I prepare for closing the meeting and agreeing the next step during my preparation			

My Personal Review and Action Plan

I have achieved the following since the last Module

As a result of this Module, I will do the following

What?	By when?	Done?