

**FACE TO FACE SELLING SKILLS**  
***MODULE 5 – STARTING THE SALES MEETING***  
***Pre-Tutorial***

**ACCOUNT MANAGER'S WORKBOOK**



## **Welcome to Module 5 – Starting the sales meeting**

Welcome to Module 5 of Face to Face Selling Skills. In this Module we shall explore the important aspect of starting the meeting itself.

We all know that first impressions count and we have already considered in the opening Tutorial what kind of impact you make on others. In this Module we shall consider this in much more detail and develop plans to help you start the meeting effectively.

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 – First impressions?

Watch the first video in Module 5 – Introduction. This video considers why the first impressions can be so important.

Then answer the following questions:

Since the exercise in Tutorial 1 when other Delegates assessed your immediate impact on them – have you made any changes to your approach?

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Are you aware of any experience in which the very first impressions had a long term impact?

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## Topic 2 – The first few seconds

Now watch Video 2 in Module 5 (M5U1) which discusses the impact made in the first few seconds and the recommendation from Dale Carnegie.

Here are the summary points:

- Smile
- Remember that the other person's name is the most important sound
- Become genuinely interested in other people
- Be a good listener and encourage others to talk about themselves
- Talk in terms of the other person's interest
- Make the other person feel important – but do it sincerely

Consider your next important meeting – if you consider Carnegie’s points, are there any aspects of your normal approach you might adapt?

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## Topic 3 - The first few words

Now watch Video 3 in Module 5 (M5U3) The First Few Words, which discusses how to introduce yourself and the meeting.

### Self-reflection exercise

Think about your normal approach to the first few words – what do you say?  
What might you change?

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## Topic 3 - The first few words

Now watch Video 3b in Module 5 (M5U3b) The First Few Words – Role Play.

What are the most useful points for you in this example?

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What changes would you make? What would you do differently in this situation?

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## Topic 4 – Important points to establish at the start

In the role play video example, the sales person wanted to established a number of points – for example who is the decision maker, who else she should meet and so on. The points you need to establish at the start will be dependent upon the market, the type of company, the role of the other person and of course the level of the relationship.

Take your most typical situation and summarise the main points you should aim to establish at the very start:

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## Topic 5 -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 impression do you aim to make within the first few seconds?

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How do you do this?

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How do you start the meeting?

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## **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 5 – STARTING THE SALES MEETING***  
***Post-Tutorial***

**ACCOUNT MANAGER'S WORKBOOK**



## **Post Tutorial WorkBook**

**Welcome to the second part of the Module 5. This WorkBook covers the post-Tutorial activity.**

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

## Topic 1 – Starting the sales meeting

### Individual Task – part 1

Select your most important customer visit in the coming two weeks, consider the preparation you did in the previous Module:

What do you want the customer to think?

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How will you start the meeting?

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What will you want to establish at the very start?

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## **Topic 2 – Starting the sale meeting - Buddy Task**

Now you have a clear understanding about how to start the sales call.

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

**What works best for me when starting the meeting?**

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**Is there anything I would add to the video recommendation?**

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

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## **Topic 3 – Starting the sales meeting**

### Assessed Task

Present your call meeting plan summary to your Line Manager.



### **Topic 3 – Starting the sales meeting - Assessed Task – Line Manager’s Review**

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

**Has clarity about the impact s/he wants to make? Yes/No**

**Knows how to make the right impact? Yes/No**

**Has carefully thought about how to start the meeting? Yes/No**

**Has defined the important points to understand at the start of the meeting? Yes/No**

Comments:

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Signed:

Name:

Position:

## Module 5 - 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

- **The first impression is made within the initial seconds of the meeting**
- **It takes a relatively long time to change the first impression**
- **Buying decisions can be made before the formal process is over**
- **Buying is heavily influenced by emotion and feeling**
- **What you wear has an important impact**
- **Smiling is important**
- **You must find topics of mutual interest**
- **You must take a genuine interest in the other person**
- **You must talk in the other person's 'language'**
- **You should know the importance of rapport building chat**
- **Know how to move from the initial chat to the meeting proper**
- **Know how you will start the meeting**
- **Known what important points and questions you want to establish and ask at the very start**

## My Capability Scorecard

Complete the Scorecard for Module 5. 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 5 STARTING THE SALES MEETING			
<p>This Scorecard defines the Best Practice for Module 5 of the Face to Face Selling Skills Program – Starting the Sales Meeting. 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</p>			
Best Practice Component	Yes/No	My confidence level (1-10)	Is there anything I must do to improve this?
1 I can explain why the first few seconds of the encounter are so important			
2 I can explain why many buying decisions are taken before the sales process ends			
3 I can explain how emotion and feeling play a significant part in the sales process			
4 I can explain how non-verbal communication impacts the initial impression			
5 I can explain the importance of smiling and eye contact			
6 I can explain the importance of taking a genuine interest in the other person			
7 I understand the importance of finding topics of mutual interest			
8 I can explain why I must clarify the customer's objectives at the start of the meeting			
9 I can define the key information I should seek to learn at the start of the meeting			
10 I can explain the best way for me to start the business part of the meeting			

## My Personal Review and Action Plan

I have achieved the following since the last Module

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

What?	By when?	Done?