FACE TO FACE SELLING SKILLS

MODULE 9 – POST MEETING ACTION

Pre-Tutorial

ACCOUNT MANAGER'S WORKBOOK

Welcome to Module 9 – Post Meeting Action

Welcome to Module 9 of Face to Face Selling Skills. In this Module we shall consider what has to happen after the meeting has finished.

Almost every sales meeting with produce some required action and in many cases the sales person will be required to collect some information, perhaps samples, prices and so on. In some cases other colleagues will be involved.

We may also agree that the customer will do something and we need to remind the customer and to ensure it does get done. This takes some skill.

In this Module we shall examine what has to happen and how we can do it.

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 – Introduction

Watch the first video in Module 9 – Introduction (M9U1). Then watch the second video (M9U2).

How important is follow up in your industry?

……
……
……
……

Topic 2 – Post meeting action

What formal and informal post meeting actions do you use?

Formal activity required by the company (CRM, letters, etc.)

……

……

………..

Informal activity I like to do? (email follow up, action agreement, etc.)

……

……

……

……

How do you follow up with the customer and ensure they have completed the agreed action?

……

……

……

………..

Topic 3 – Developing a post meeting action template

Many high performing sales people use a simple formatted sheet to define the agreed action. They sometimes complete this in the meeting itself but more often after the meeting and send a copy to the customer. This is a very good way of confirming the agreement, confirming what you will do by when and gently reminding the customer that he or she also has some work to do.

Task

Review the following draft template. Note that it can be used as a planning tool also. Note that it defines the meeting objectives for both sides.
Would this work for you?
What changes (if any) would you make to suit your situation and needs?

……

……

………

……

……

……

Customer Meeting Plan and Summary	Month		Name	

Customer	Date	Where	Who	Title

Objectives of the meeting	
1	To…
2	To…
3	To…
4	To…

Key points to be discussed	
1	
2	
3	
4	
5	

My/our agreed action					
	What	**Who**	**When**	**Status**	**Done**
1					
2					
3					
4					
5					
Customer agreed action					
1					
2					
3					
4					
5					
Other issues/points/notes /information I need					
1					
2					
3					
4					
5					

Topic 4 – Ensuring that colleagues follow through

Getting your colleagues perhaps in other departments to complete actions you have requested is one of the more challenging tasks for the sales person.

How can you ensure that colleagues know about and agree to what you need?

……

……

……

……

………..

How can you ensure the job gets done?

……

……

……

……

……

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 are the challenges for you?

……

……

……

What is the best way to follow up with the customer for you?

……

……

……

What have you learned from this Module?

……

……

……

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 9 – POST MEETING ACTIONS

Post-Tutorial

ACCOUNT MANAGER'S WORKBOOK

Post Tutorial WorkBook

Welcome to the second part of the Module 9. 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 – Post meeting learning reflection

Individual Task

We discussed the important point of learning and sharing ideas.

How should you go about ensuring that you identify and develop the personal learning issues?

……

……

………..

How can you best share successes and ideas?

……

……

……

……

……

Topic 2 – Post meeting actions

Individual Task

Reflect on the Tutorial discussion and review your post meeting template

Are there changes to make?

……

……

……

……

……

……

……

……

……

Topic 3 – Questions and objections

Assessed Task

Select one recent customer meeting and use the post meeting template to summarise the action for you and the customer.

Present your template to your manager.

Topic 4 – Post meeting actions - Assessed Task – Line Manager's Review

Having reviewed the results of the Assessed Task on the most post meeting actions, are you satisfied that the Sales Person:

Has a workable method to capture the actions? **Yes/No**

Has defined the necessary actions? **Yes/No**

Has a workable method of communicating internally to? **Yes/No**

Has considered how to follow up effectively with the customer? **Yes/No**

Comments:

………

………

……….

Signed: Name: Position:

Module 9 - 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

- **Many customers are critical about suppliers' ability to follow up**
- **It is the sales person or account manager's responsibility to ensure that both sides complete the agreed action**
- **Always agree the next steps verbally before you leave the meeting**
- **Always confirm the next steps in writing after the meeting**
- **Use a simple action checklist to ensure everyone knows what to do by when**
- **Check that the right actions will be completed on time**
- **Use the action template with the customer to check completion**
- **Consider what you have learned from each meeting**
- **Note the new learning in your company's data collection system**
- **Identify the specific personal learning - what will you do differently next time?**

My Capability Scorecard

Complete the Scorecard for Module 9. 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 9 POST MEETING ACTIONS				
This Scorecard defines the Best Practice for Module 9 of the Face to Face Selling Skills Program – Post Meeting Actions **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 recognise that the meeting process does not stop when I leave the customer			
2	I understand that customers commonly complain about poor follow up			
3	I realise that I must takes responsibility for all of the follow up required by my company			
4	I always confirm the next steps verbally before I leave the customer			
5	I always confirm the next steps in writing after meeting the customer			
6	I use a simple template/form to summarise the post meeting activity			
7	I ensure that colleagues understand what they must do by when			
8	I update the new learning and information from the meeting in the preferred system			
9	I take time to reflect on the meeting to consider the learning for me			
10	I identify the things I will change for the next meeting			

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?

0