LEARNING OUTCOMES

1. Explain why it is essential to focus on the customer when planning sales calls.

2. Understand alternative ways of communicating with prospects and customers through canned sales presentations, written sales proposals, and organized sales dialogues or presentations.

3. Discuss the nine components in the sales dialogue template that can be used for planning an organized sales dialogue or presentation.
LEARNING OUTCOMES

4. Explain how to write a customer value proposition statement
5. Link buying motives to benefits of the seller's offering, support claims made for benefits, and reinforce verbal claims made
6. Engage the customer by setting appointments
THE STRATEGIC PROSPECTING PROCESS

Generate sales leads
(qualify sales leads)

Determining Sales Prospects

Prioritizing Sales Prospects

Preparing for Sales Dialogue

Remaining Stages in the Trust-Based Sales Process
WHY IS SALES DIALOGUE AND PRESENTATION PREPLANNING IMPORTANT?

- Sales presentation preplanning is important because it helps keep the salesperson organized and focused.
- The key element to sales presentation planning is the creation of one or more sales call objectives.
- These objectives are important because they help the salesperson manage accounts through the sales process and they serve as a tool for measuring performance.
ELEMENTS OF A SALES PLANNING

Always have a sales call objective.

- Specific
- Measurable
- Directly beneficial to customer
  - Save money, replace old equipment, to introduce a new line of merchandise, replenish stock

Development of a customer profile

- Try to find out as much as you can about the customer/business
- Develop a profile
- Who makes the buying decision
- What is the buyer's background
- What are the terms of the sale (delivery, credit, guarantee, service)
- What are your competitors with the company
- What is the past history of the account

Customer Benefit Plan

- Figure out what information you will use in your presentation based on the objective and customer profile
The sales objective. Begin each sales call with at least one objective.

- Sales is a process. Setting your objective is just one step in the process.
- Your objective will answer the question “If this call is successful what will result?”
  - And you can’t say to get an order.
  - Reasonable objectives are ones that move the selling process forward.

Reasonable objectives for a sales call are presenting a solution and getting feedback, getting agreement for a product trial, or meeting a key decision maker.
PRE-CALL PREPARATION IS KEY…

- Top salespeople must be inquisitive and able to assess their own efforts when it come to pre-call prep
- They must be fully prepared in terms of:
  - What information they will need from the buyer
  - What they will want to convey to buyer
  - What support information they will need
  - What obstacles they will need to overcome
- Sales technology is assisting pre-call planning
  - LinkedIn
  - InsideView.com
  - Google.com
  - Hoovers.com
  - Customer websites
POSSIBLE SALES OBJECTIVES

- **Build Rapport**
  - Demonstrate you are curious, informed and likeable
    - Ask/or demonstrate about their career trajectory, discussing mutual interests and bringing up local news or sports.
    - You can often use social to get an idea of a prospect’s interests before calls to help you prepare

- **Identify (confirm) Needs and Challenges**
  - Two prospects at similar companies with the same job title might have completely different pain points and goals. They might have radically different use cases for your offering

- **Establish Product/Service Compatibility**
  - Demonstrate how your product/service can easily integrate as part of their solution

- **Define the process**
  - It is much easier to move deals forward if your customer understands the process

- **Gauge Urgency**
  - Set forth a buying timeline if replacing another solution. i.e. find out when the contract ends

- **Identify or Confirm Competitors**
  - That way you can look for ways to sell against your competitors

Always Confirm Next Steps
SO... WHAT SHOULD YOU KNOW

- **History and policies of the firm**
  - Reputation, standing in the industry, policies, services guarantees, etc.

- **Production methods**
  - Process through which the product passes in the factory (raw materials, sources of materials, supply chain, etc.)

- **Prices, types, terms of sale**
  - Types and sizes of products and adaptation to each customer’s needs.

- **Serviceability and durability**
  - Materials, service offerings, durability tests, reports, etc.

- **Competition**
  - Including offerings, pricing, benefits, and what a competitor can offer that the business can’t

- **Use of the product**
  - How is the product used, different uses, operating instructions, etc.

- **Policies and procedures**
  - How will the order be processed, how long, returned goods, return policies, etc.

- **Channel of distribution**
  - How does the company move and distribute products, product lines, assortments, promotion, distribution, etc.

- **Promotions**
  - How is the company promoted.
SALES DIALOGUE

Business conversations between buyers and sellers that occur as salespeople attempt to initiate, develop, and enhance customer relationships.

Sales dialogue occurs over time and includes sales calls and other forms of buyer-seller communication.
CUSTOMER-FOCUSED SALES DIALOGUE PLANNING

**Sales call:** In-person meeting between the buyer and the sales team

**Sales presentations:** Comprehensive communications designed to persuade the customer to make a purchase

**Sales dialogue:** Business conversations between buyer and salesperson to initiate, develop, and enhance customer relationships

AKA: sales conversation
In planning customer communications, sales people must decide on a basic format:

- Canned sales presentation
- Written sale proposal
- Organized sales dialogue

A sales person might use one or more of these with a customer.

Each format has advantages and disadvantages.
Canned Presentations

- Include scripted sales calls, memorized presentations, and automated presentations
- Can be complete and logically structured
- Do not vary from buyer to buyer; should be tested for effectiveness

Written Sales Proposals

- Proposal is a complete self-contained sales presentation
- Written proposals often accompanied by sales calls before and after the proposal is submitted
- Thorough customer assessment should take place before customized proposal is written

Organized Sales Dialogues and Presentations

- Address individual customer and different selling situations
1. CANNED SALES
PRESENTATION

- Automated presentations
- Telemarketing industry uses often
- Can incorporate computer graphics, video or slides
- When done right – complete and logically structured
- Objections and questions are planned for ahead of time
- Sales message varies little from customer to customer
- Great for inexperienced salesperson (confident booster)
- Always test for effectiveness (real customers)
- Can be effective – not for many b-to-b situations
- Salesperson talks for about 80 – 90% of the time

Makes an implicit assumption that customer needs and buying motives are essentially homogeneous (the same)
4 ACTING TIPS FOR DELIVERING A CANNED SALES SCRIPT

Don't jump to memorization. The first thing most sellers do when presented with a script is jump straight to memorization. Improper and immediate memorization is one of the primary reasons sellers end up sounding canned and insincere. A professional actor will read through a script several times before attempting to memorize it, allowing thoughts, ideas, and questions to develop naturally as he familiarizes himself with the content. Get the big picture of the script first and let memorization be a natural byproduct of that familiarity.

Do know your subtext. While you’re getting familiar with your script, focus on the meaning of each line. What’s behind the words you’re using? In other words, what are you really saying and why? This if often called “your intention” in acting, and intentions can be quite powerful in sales. (Read more about the power of intentions here.) Are you trying to get them excited about this feature? Motivate them to change vendors? Surprise them with industry findings? Just make sure you know what you are saying and why. (And p.s., the answer is not “because it’s in the script!”)

Don’t pre-determine how to say it. I know there are some sales coaches or consultants out there who will tell you precisely what words to emphasize, where to pause or smile or gesture. I beg of you, don’t do it! This advice produces some simply awful amateur acting and reinforces a mechanical delivery that is tough to break. If you watched a great actor do the same scene night after night, chances are she would not deliver her lines exactly the same way every time. Each night is different because each audience is different. Same goes for sales. Stay closely connected to the intention of what you’re saying, respond to verbal and nonverbal cues from your prospect and let each new emotion in the moment express itself in your words. That will keep your delivery fresh and exciting.

Do rehearse properly. It’s a common misconception that over-rehearsing a script will cause you to sound phony or canned, when precisely the opposite is true. (Read more about common presentation myths that may be hurting your success!) Knowing your lines well enough so that you don’t have to struggle for the words or meaning frees you up to place your energy on delivering your message in an impactful and persuasive manner while adjusting to your audience.
2. WRITTEN SALES PROPOSALS

COMPLETE SELF-CONTAINED PRESENTATION

ACCOMPANIED BY SALES DIALOGUES BEFORE OR AFTER THE PROPOSAL IS DELIVERED

SOMETIMES CUSTOMER RECEIVES A PROPOSAL AND REQUESTS SELLER TO MAKE A SALES CALL TO FURTHER EXPLAIN

SHOULD BE PREPARED AFTER A THOROUGH ASSESSMENT OF THE BUYER’S SITUATION IS MADE

FREQUENT IN COMPETITIVE BIDDING SITUATIONS OR SITUATIONS INVOLVING THE SELECTION OF A NEW SUPPLIER

VIEW AS BEING MORE CREDIBLE THAN SPOKEN WORD (CANNED)

WITH WIDESPREAD OF MULTIMEDIA, WRITTEN SALES PROPOSALS MORE IMPORTANT TO CONVEY CLEAR INFORMATIVE PROPOSALS
Tips for Creating Effective Sales Proposals

• When writing a proposal, pretend you are one of the buyer’s decision makers and decide what you need to know to make a decision.

• Think of the proposal as an in-depth conversation with the buyer’s decision makers.

• Give the decision makers all of the information they need to make an informed decision.

• Avoid boilerplate proposals that use the same wording for all customers.

• Avoid so-what proposals that do not give customers the financial justification for buying your product.
WHY WRITTEN PROPOSAL FAIL

- Customer does not know the seller
- Proposal is not customer-specific
- Executive summary does not immediately tell what's in it for the customer
- Proposal does not use the customers company jargon
- Writing is flat, grammatically incorrect, lacks conviction and data
- Generic examples not matching the customer
- Not convincing
- Poor layout
- Vague
ABOUT JOELLE CHARMING

JOELLE CHARMING

WEDDING SERVICES PROPOSAL

Chateau de Los Banos & Ivory Suites

OCTOBER 22, 2023

WEDDING INFORMATION

BRIDAL NAME: Zoe Rice
GROOM'S NAME: John Smith

WEDDING DATE: June 1, 2023
WEDDING VENUE: Chateau de Los Banos

SERVICES & INVESTMENT

A package of services includes unlimited venue, photographer, and floral arrangements.

REQUIREMENTS:

- Payment of 50% non-refundable deposit
- Contact and meeting with vendors

PAYMENT STRUCTURE

The remaining balance is due on the day of the wedding.

$10,000.00

WEDDING SERVICES PROPOSAL

Thank you for considering Joelle Charming for your special day. We are honored to be a part of your wedding plans.

Joelle Charming

Thank you for your consideration.
Every proposal ought to be tailored to the specific sale, but using a template can help you make sure it hits these six highlights:

1. summary of the customer’s business need
2. statement of the customer’s goals
3. how this proposal will meet the customer’s needs within the budget
4. the customer’s deadlines
5. your company’s qualifications for delivering the solution
6. whatever disclaimers your company uses when it makes a sale
PARTS OF THE SALES PROPOSAL

Executive Summary

- Demonstrates salesperson’s knowledge about the customer’s need and creates a desire in the customer to read it
- Spell out customers problems, proposed solution and resulting benefits to the customer

Customers Needs and Proposed Solutions

- Includes situation analysis—concisely explain the salesperson understanding of the customers situation, problems and needs.
- Recommended solution presented and supported with illustrations and evidence on how the solution uniquely addresses buyers’ problems and needs
- Include: benefits resulting from solution

Seller Profile

- Information about the selling company – including overview of the firm, with emphasis on company’s capabilities
- Case histories of customers for whom the company solved similar problems

Pricing & Sales Agreement

- Part of proposal that “asks for the order”
- Present pricing information and delivery options

Implementation and Timetable

- This section makes it easy for the buyer to make a positive purchase decision.
- It should convey: If you like this proposal and want to act on it, here is what you do!
EVALUATING SALES PROPOSAL (FIVE IMPORTANT DIMENSIONS)

5 Important Dimensions

- Reliability
- Assurance
- Tangibles
- Empathy
- Responsiveness
EVALUATING SALES PROPOSAL

Reliability

- reflects your (the seller’s) ability to identify creative, dependable, and realistic solutions and strategies and match them to the buyer’s needs and wants.

Assurance

- builds the buyer’s trust and confidence in your ability to deliver, implement, produce, and/or provide benefits.

Review Exhibit 6.3 – pg. 135 in book
EVALUATING SALES PROPOSAL

- **Tangibles**
  - enhance and support the communication of your message and invite readership by its overall appearance, content, and organization.

- **Empathy**
  - confirms your thorough understanding of the buyer’s business and his or her specific needs and wants.

- **Responsiveness**
  - developed in a timely manner and demonstrates a willingness to provide solutions for the buyer’s needs and wants and to help measure results.
ORGANIZED SALES DIALOGUES –
MAY PROCEED OR FOLLOW A WRITTEN SALES PROPOSAL

Conversations over multiple encounters including sales calls, phone calls, email, etc.

Conversations are customized based on each customer’s unique characteristics.

May include standardized marketing communications material.
1. **Prospect Information**
   A. Company and key person information

<table>
<thead>
<tr>
<th>Company Name:</th>
<th>Type of Business:</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Prospect’s Name:</th>
<th>Key Decision Maker:</th>
<th>Job Title:</th>
</tr>
</thead>
</table>

   B. Other influences on the purchase decision: For all key people involved in the buying process, provide names, job titles, departments, and roles in the purchase decision.

<table>
<thead>
<tr>
<th>Name(s)/Job Title</th>
<th>Departments</th>
<th>Role in Purchase Decision</th>
</tr>
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</table>

   Add other people as necessary

2. **Customer Value Proposition:** A brief statement of how you will add value to the prospect’s business by meeting a need or providing an opportunity. Include a brief description of the product or service:

3. **Sales Call Objective** (must require customer action such as making a purchase, supplying critical information, etc.)

4. **Linking Buying Motives, Benefits, Support Information, and Reinforcement Methods:** This section should address the buying motives of all persons who will be involved in the upcoming sales call.

   A. **Buying Motives:** What is most important to the prospect(s) in making a purchase decision?

   **Rational** motives include economic issues such as quality, cost, service capabilities, and the strategic priorities of the prospect’s company.

   **Emotional** motives include fear, status, and ego-related feelings. List all relevant buying motives in order of importance.

   1.

   Continue listing all relevant buying motives and information in columns B, C, and D.

   B. **Specific Benefits Matched to Buying Motives:** Benefits to be stressed are arranged in priority order (sequence to be followed unless prospect feedback during the presentation indicates an alternative sequence). Each benefit should correspond to one or more buying motives.

   C. **Information needed to support claims for each benefit.**

   D. **Where appropriate, methods for reinforcing verbal content (AV, collateral material, illustrations, testimonials, etc.).**
5. Current Suppliers (if applicable) and Other Key Competitors.

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**Plans for the first few minutes of the sales call:**

Introduction, thanks, agenda agreement. Then begin ADAPT as appropriate or transition into other sales dialogue or presentation:

**Assessment**

**Discovery**

**Activation**

**Projection**

**Transition to Presentation**

**Note:** The ADAPT process might take place over several sales conversations during multiple sales calls. In other cases, it might be concluded in a single sales call, then immediately followed by a sales presentation.

7. Anticipated Prospect Questions and Objections, with Planned Responses.

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8. Earn Prospect Commitment.

**A preliminary plan for how the prospect will be asked for a commitment related to the sales call objective.**


**Statement of follow-up action needed to ensure that the buyer-seller relationship moves in a positive direction.**
I. PROSPECT INFORMATION

- This section is used to record specific information on the prospect
  - Company name
  - Key decision maker’s name
  - Job title
  - Gate keeper, user or influencer
  - All key players to receive appropriate information

### 1. Prospect Information

**A. Company and key person information**

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<thead>
<tr>
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<th>Type of Business</th>
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**B. Other influences on the purchase decision:** For all key people involved in the buying process, provide names, job titles, departments, and roles in the purchase decision.

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**3. Sales Call Objective** (must require customer action such as making a purchase, supplying critical information, etc.):

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</table>
A customer value proposition is a business or marketing statement that describes why a customer should buy a product or use a service.

Clearly states why the customer will be better off by doing business with the salesperson and his/her firm.

Answers the question:

“Why should I spend my time with you?”
### Creating a Value Proposition

<table>
<thead>
<tr>
<th>Primary business reasons that customers would want to use your offering</th>
</tr>
</thead>
</table>
| • Revenue generation  
• Cost savings  
• Customer retention  
• Building market share  
• Productivity gains  
• Profitability  
• ROI |

<table>
<thead>
<tr>
<th>Keep the statement simple</th>
</tr>
</thead>
<tbody>
<tr>
<td>Direction for sales dialogue is clear</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Choose the key benefit(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Those likely to be most important to the specific customer who is the audience for this presentation</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Make the value proposition as specific as possible</th>
</tr>
</thead>
</table>
| Tangible outcomes  
Improvements to revenue  
Cost containment  
Increase market share |

<table>
<thead>
<tr>
<th>Provide Added Value</th>
</tr>
</thead>
</table>
| Reflect product or service dimensions that add value  
Delivery  
Training  
Certification |

<table>
<thead>
<tr>
<th>Promise only what can be delivered</th>
</tr>
</thead>
</table>
| Don’t BS  
Improve  
Cut  
Save  
Accelerate  
Grow  
Minimize |

<table>
<thead>
<tr>
<th>Use action Verbs</th>
</tr>
</thead>
<tbody>
<tr>
<td>About all key metrics including time frame, financials, percentage targets</td>
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</table>

<table>
<thead>
<tr>
<th>Be specific</th>
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</thead>
<tbody>
<tr>
<td>The verbal communication of the customer value proposition they are not familiar with. Do they understand</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Practice</th>
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<tbody>
<tr>
<td><a href="https://www.wordstream.com/blog/ws/2016/04/27/value-proposition-examples">https://www.wordstream.com/blog/ws/2016/04/27/value-proposition-examples</a></td>
</tr>
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3. SALES CALL OBJECTIVE

- Asks the salesperson to determine the objective of his or her sales call.
- Sales call objectives state what salespeople want the buyer to do as a result of their call
  - Placing an order
  - Testing the product in their business
  - Agreeing to pricing information to move forward
- Different objectives for different parts of the sales call
  - During the introduction call, the objective might be to introduce buyer to their company and products.
4. BUYING MOTIVES

• Rational
  Typically relate to the economics of the situation, including cost, profitability, quality, services offered, and the total value of the seller’s offering as perceived by the customer.

• Emotional
  Includes motives such as security, status, and need to be liked; sometimes difficult for salespeople to uncover these motives.

4. Linking Buying Motives, Benefits, Support Information, and Reinforcement Methods: This section should address the buying motives of all persons who will be involved in the upcoming sales call.

| A. Buying Motives: What is most important to the prospect(s) in making a purchase decision? Rational motives include economic issues such as quality, cost, service capabilities, and the strategic priorities of the prospect’s company. Emotional motives include fear, status, and ego-related feelings. List all relevant buying motives in order of importance. | B. Specific Benefits Matched to Buying Motives: Benefits to be stressed are arranged in priority order (sequence to be followed unless prospect feedback during the presentation indicates an alternative sequence). Each benefit should correspond to one or more buying motives. | C. Information needed to support claims for each benefit. | D. Where appropriate, methods for reinforcing verbal content (e.g., collateral material, illustrations, testimonials, etc.). |
5. COMPETITIVE SITUATION

- Understanding the competitive situation is essential
- Buyers always make competitive comparisons in their decision process
- Be prepared. Know your competition

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5. Current Suppliers (if applicable) and Other Key Competitors.


Plans for the first few minutes of the sales call:
Introduction, thanks, agenda agreement. Then begin ADAPT as appropriate or transition into other sales dialogue or presentation:
- Assessment
- Discovery
- Activation
- Projection

Transition to Presentation

Note: The ADAPT process might take place over several sales conversations during multiple sales calls. In other cases, it might be concluded in a single sales call, then immediately followed by a sales presentation.
6. BEGINNING THE SALES DIALOGUE

5. Current Suppliers (if applicable) and Other Key Competitors.

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Transition to Presentation

Note: The ADAPT process might take place over several sales conversations during multiple sales calls. In other cases, it might be concluded in a single sales call, then immediately followed by a sales presentation.
ORGANIZED PRESENTATION FORMATS

- Requires a knowledgeable salesperson who can react to questions and objections from the prospect
- Best for most sales situations. Why?
  - Flexibility allows for exploration of customer needs
  - By participating in a dialogue, both buyer and seller establish a mutually beneficial relationship
- First Stage – Needs Development
  - Devoted to a discussion about the buyers needs.
    - Buyer should be talking about 60 – 70% of time
    - Salesperson uses the first 4 questioning techniques in ADAPT process
      - Assessment, Discovery, Activation & Projection
ORGANIZED PRESENTATION FORMATS

- The second stage of the process (Need Awareness)
  - Verify what the buyer thinks his or her needs are and make the buyer aware of potential needs that might exist
    - Fast food restaurants were slow to recognize the need to offer low fat/carb menu items.
    - Subway gained competitive advantage by working with suppliers to formulate a number of menu alternatives for health-conscious customers.
  - At the end of the needs-awareness stage, the prospect should confirm their needs
    - Good time to restate the prospect's needs and clarify exactly what they are.
- Last state of the process (Needs Fulfillment)
  - The salesperson must show how his or her product and its benefits will meet the needs of the buyer.
  - Salesperson will do more of the talking by indicating what specific product will meet the buyer's needs.
    - Remember, researching the prospect or customer, prepares you for the sales dialogue.
7. ANTICIPATED PROSPECT QUESTIONS AND OBJECTIONS

- Discuss in chapter 8
- Know what questions and objections will arise
- Anticipate issues and prepare responses

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8. Earn Prospect Commitment.

| A preliminary plan for how the prospect will be asked for a commitment related to the sales call objective. |


| Statement of follow-up action needed to ensure that the buyer-seller relationship moves in a positive direction. |
8. EARN PROSPECT COMMITMENT

- Eventually, there will come a time to ask for a customer’s purchase decision
  - In most cases, it is obvious point in the conversation
  - Other times you may need to probe further
  - Discuss further in chapter 8

---

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9. BUILD VALUE THROUGH FOLLOW-UP ACTION

- Finally, the salesperson must always be looking for ways to enhance the relationship and move it in a positive direction.
- Always make a note of any promises made during the sales calls and especially during proposal presentation.
- Take notes to ensure appropriate steps are covered and that all the pertinent information is collected.
ENGAGING THE CUSTOMER

Request an appointment

- Give the prospect a reason why an appointment should be granted
- Request a specific amount of time
- Suggest a specific time for the appointment