

FIVE-PHASE SALES CHECKLIST

PHASE 1: PRE-PLANNING

- Break your planning down into phases
 - Phase 1: know who you want to target
 - Phase 2: prepare your target list with all their contact details
 - Phase 3: nominate a time in your calendar as your sales preparation day i.e. the day you make your appointments
 - Phase 4: organise your diary according to type i.e. by customer type, location, existing or new business
- Research the account prior to the call, know everything about their business
- Research the person prior to the call, know everything about their job role and their key performance indicators (because what they're measured by influences their buying decisions)
- Find out who the decision-makers are by asking "Who else besides yourself might be involved in the decision-making process?" If there's more than 1, ensure you get them to the meeting too
- Plan to speak only with decision makers and not technical buyers who cannot make the final decision
- Audit their competitors so you know who they are measuring their business against
- Plan your calls in an orderly manner i.e. make appointments in similar geographical vicinity to each other, by channel, or by existing or new business
- Prepare all materials, brochures, contracts, sell sheets, samples, price guides, flyers, order forms and business cards
- Answer the three important pre-call questions before you make the call
 - 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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- 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
- Make appointments and if you aren't feeling strong and confident, stand up when you make the call

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PHASE 2: THE FEW DAYS BEFORE

- Send an outline of the agenda to the client before the meeting
- Have three points prepared that demonstrate how you add-value
- Plan your questions and practice saying them with confidence
- Prepare your responses to any objections that may present
- Find out about the prospect's office so you know what to expect when you arrive - stairs, open plan office layout, parking etc
- Send any pre-reading materials a few days before meeting
- If you are going on the road, pack your sales call bag
- If you are going on the road, have your sales call clothes ready and this may include supportive pantyhose and shoes (sounds weird but they're helpful when you're walking a lot)
- If meeting is held online, ensure you are both using the same technology
- If meeting is held online, ensure you send online links and any pre read documents before the meeting
- If you are meeting online, check all the technology works and you are familiar with it

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PHASE 3: ON THE DAY

- Have sales and marketing resources and materials on hand - brochures, contracts, sell sheets, samples, price guides, flyers, order forms and business cards
- Wear clothes that you'll be comfortable in but are appropriate for the meeting. This may mean mirroring the buyer - wearing something similar to them (without being icky and 'single white female' about it)
- Have your route for the day mapped out and know where you are going, how you'll get there and the time it takes to get to each meeting accounting for unexpected delays such as traffic or road closures
- Have your note taking implements with you and this may include pen and paper or you may choose to use a tablet such as an iPad
- If you are meeting online, be in the online meeting room a few minutes before your prospect to check all the technology works and you are familiar with all the options
- If you are meeting online make sure the power is fully charged on the device you are using and the lighting is right to ensure you and your presentation are easily viewed

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PHASE 4: ON THE CALL

- Greet your prospect with a smile and eye contact (if meeting online you may need to look into the camera and not the 'eyes' of your prospect (this can take a bit of getting use to if you've never used online meeting technology before but trust me, it's so much more powerful when you look into the camera because that is looking "in their eyes")
- Reconfirm that your prospect has the full amount of time you booked in with them i.e. "we set aside 30 minutes for this meeting, is that still okay with you?" The reason you do this is to give them an out if they want one then and there - which is unlikely and really it is all about giving you permission once again to conduct the meeting within the agreed time frame. It's a positive psychological tactic I like to use to show respect - for both your prospect and you as a seller. It's a very powerful tool for you to use and elevates you above just another vendor status.
- Break your call down into phases
 - Start by setting the tone (see point about asking them if they still have the time set aside)
 - Proceed with asking them open questions to determine their position and listen for their answers
 - Present your offer
 - Ask if they're interested in what you've offered and if they have any questions
 - Ask what are the next steps
 - Position your follow up intentions
 - Thank them for their time and if appropriate (not usually done on an initial meeting) ask for a referral to another opportunity they may have influence over

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PHASE 5: POST SALES CALL

- Write thank you notes for appointments or orders
- Earn the right to ask for reference letters and referrals ("Do you know three people who could benefit from my product and service like?")
- Establish a schedule for follow-up calls and visits
- Ask what are three important things we can do as a vendor to keep our relationship strong
- Set yourself reminders at regular intervals to revisit the account whether you are a supplier or yet to be engaged
- Celebrate your wins and come tell us inside The Foodpreneur Coach