

Sales Call Check List: What Every Seller Should Consider Before a Call!



By Thomas J. Williams and Thomas Saine

Skilled and successful sales professionals recognize the importance of call planning in conducting an effective sales meeting. How many times have you left a meeting only to realize that you didn't get the information, commitment or action anticipated? Today's buying influences expect sellers to be professionals who can manage a meeting, focus on the buyer's needs, and provide insight.

Here is a brief checklist—a series of key questions—that will help you test your readiness for any important sales call.

Key Questions to Consider

1. **Identifying Buyers & Influencers.** Who will be attending the sales call or meeting? What's their title and area of responsibility? To whom do they report?
2. **Identifying Each Stakeholder's Role.** What role might each participant play? MHI Global uses the terms Economic Buyer, User Buyer, Technical Buyer and Coach? Others may refer to the "relevant executive", "executive decision maker", "champion" or something else.
3. **Discovering Buyer Needs & Issues.** Have you prepared questions to explore what each buying influence wishes to accomplish, fix or avoid? Do you understand the organizational needs the buying decision is meant to address? Remember that underlying needs may change as buying influences come to understand more fully the problem or opportunity and its implications.
4. **Exploring Priorities & Urgency.** Are your questions focused on exploring the size, scope, urgency and priority of needs? Are your questions worded in a way that engages the buying influence and allows them to share the information you need? Remember that questions aren't designed solely for your benefit. You are helping your buying influences identify problems, opportunities and implications.

5. **Gaining Action Commitment.** Are you prepared to ask or suggest an action commitment as a result of the sales call? Does the action step move the buying process forward? Does it increase the probability of winning the sales opportunity? Remember, if your sales call doesn't result in a measurable commitment from a buying influence it was a "visit" and not a sales call.
6. **Assessing the Buying Process.** Based on the purpose of the sales call, do you know where each buying influence is in the buying process? Sales professionals ask questions (or provide information) that are appropriate to where the buying influence is in the buying process. According to CSO Insights 47.4% of sales forces understand their customer's buying process.¹
7. **Anticipating Objections.** What objections or challenges to your position do you anticipate? Sales professionals should anticipate objections or challenges. Consider what concerns might be voiced about price, customer service, and corporate resources. Savvy sellers put themselves in the buyer's shoes and anticipate tough questions. They prepare thoughtful, documentable and succinct responses.
8. **Positioning Your Solution.** Buyers don't buy products; they invest in solutions. Sales professionals are able to describe skillfully how their product or services addresses a buyer's needs. According to CSO Insights, their data indicates that buyers feel that 44.7% of the sales professionals do not effectively differentiate their product, service or solution.²
9. **Building Credibility.** How will you build trust and credibility during the sales call? People buy from sellers they find trustworthy and credible. Effective sellers plan ways to seed trust and credibility. They plan to share experiences, tell stories, cite references or provide documentation. They make routine "credibility" deposits at every customer encounter.
10. **Addressing Customer Benefits.** Consider putting yourself in your customer's position. "What's in it for me to meet with you today?" In other words, why should they take time out of their busy day? Sellers should prepare to express a customer benefit early in the meeting and make sure they deliver on the benefit before close of the call. Practice ensures that sellers plan and articulate a value for the buyer.
11. **Mitigating Risk.** Buying always has a degree of risk associated with it. Nagging fears about implementation, performance, customer service, training and future pricing trouble most buyers. Sales professionals help buyer's identify their fears and assuage their concerns.

Parting Thoughts

Call planning is a must for all sales professional. Some sellers prefer to write out their sales call plan; others prefer to do it mentally. Regardless of the method the eleven aforementioned check points should help ensure adequate preparation.

As always we welcome your thoughts and input. Let's start a discussion and elevate the sales profession with a thoughtful, civil and informative discourse.

1. CSO insights Sales Performance Optimization Study: Win More Analysis 2015
2. CSO insights Sales Performance Optimization Study: Win More Analysis 2015

Authors: Thomas J. Williams and Thomas Saine

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