

Sales Call Planning

How to Make It Work Efficiently



Idea Club Gold

6028 Sheridan Drive • PO Box 410
Williamsville, NY 14231-0410
Phone: 716.631.8981 • Fax: 716.631.5272
www.ideaclubgold.com

Forms

Sales Rep: Carol Kay Account: ABC Financial Credit Call Date/Time: 1/14/03 9 am

CLIENT ATTENDEES	TITLE	STAFFING CO. ATTENDEES
1. <u>Jane Smith</u>	<u>HR Supervisor</u>	1. <u>Carol Kay</u>
2. <u>John Doe</u>	<u>MGR. Telemarketing</u>	2. <u>Kathy T. (Telemarketing Recruiter)</u>
3. _____	_____	3. _____

CALL OBJECTIVES (A call objective must have a valid business reason.)

- M Review last temp (Mary Carr – on 13-week assignment in Doe’s dept.)
- P Get approval on plan for providing 2nd shift temps
- V Lock up 2nd shift and replace competitor on 1st shift temps in telemarketing dept.

ANTICIPATED "ADVANCE" ACTION (How will you move this sale forward?) Get commitment for start date and confirm number of temps needed to start and after 30-day trial period for second shift.

DESCRIBE THE CUSTOMER'S "PROBLEM" Expanding telemarketing to cover collections on "B" level accounts; High turnover has become very expensive; Client just lost two Asst. Mgr.'s to a competitor; Too much to do—not enough supervisory personnel; Running out of office space (use 2nd shift); Detect some unhappiness in using competitor (unable to confirm); Currently uses no incentive for longevity.

BEING EFFECTIVE FOR THE CLIENT (What are my unique strengths for this sale?)	"PROVE IT"
<u>Currently supply telemarketing temps to two other major accounts. Bring a sample of our specialized review form to show client; Introduce longevity bonus plan to cut turnover;</u>	<u>Name these firms and supply contact info.</u>
<u>Introduce specialist from office who handles all telemarketing recruiting.</u>	<u>Bring completed review forms.</u>
	<u>Bring sample of longevity bonus.</u>
	<u>Have Kathy T. relate current clients' positive comments.</u>

POSITIONING (What will you do to check/improve our positioning with this client?) How well did Mary Carr perform in the telemarketing dept. covering for a 13-week maternity leave—did she "set the stage" for additional temps from us? Bring temp review form to the meeting.

THE ACTION STEP (To be completed after each call) _____

Sales Rep: _____ Account: _____ Call Date/Time: _____

CLIENT ATTENDEES	TITLE	STAFFING CO. ATTENDEES
1. _____	_____	1. _____
2. _____	_____	2. _____
3. _____	_____	3. _____

CALL OBJECTIVES (A call objective must have a valid business reason.)

M _____

P _____

V _____

ANTICIPATED "ADVANCE" ACTION (How will you move this sale forward?) _____

DESCRIBE THE CUSTOMER'S "PROBLEM" _____

BEING EFFECTIVE FOR THE CLIENT (What are my unique strengths for this sale?)	"PROVE IT"
_____	_____
_____	_____
_____	_____

POSITIONING (What will you do to check/improve our positioning with this client?) _____

THE ACTION STEP (To be completed after each call) _____

Questioning Techniques

Investigative / Confirming Questions

Used to open a sales call. They help you:

- Verify data about the client's organization
- Update your information on who's who in the decision-making hierarchy.
- Begin to probe potential business issues that could be affecting this client
- Set the foundation to move your sales call objectives forward



Problem Defining and Developing Questions

Used to uncover difficulties and probe about the possible effects of these problems. They help you:

- Discover areas causing your customer "pain"
- Develop the importance of solving these problems
- Encourage your customer to explore issues openly
- Zero in on the critical vs. the superfluous

Commitment Questions

Used to gain concurrence regarding the importance of implementing a solution to the client's problem. They help you:

- Understand those staffing issues that really need a timely resolution
- Move the sale toward a close
- Uncover any issues that remain to be resolved

Sales Rep for this role play: _____ Date: _____

Person acting as the client: _____

Using a 1 – 10 scale with “1” being *not at all effective* and “10” *extremely effective*, please rate the rep’s effectiveness in:

- 1. Asking enough questions
1 2 3 4 5 6 7 8 9 10
- 2. Understanding the client’s problem
1 2 3 4 5 6 7 8 9 10
- 3. Addressing the problem
1 2 3 4 5 6 7 8 9 10
- 4. Offering a viable solution
1 2 3 4 5 6 7 8 9 10
- 5. Offering more than one solution
1 2 3 4 5 6 7 8 9 10
- 6. Demonstrating sincerity
1 2 3 4 5 6 7 8 9 10
- 7. Positioning
1 2 3 4 5 6 7 8 9 10

Survey Questions

1. The best thing the person in the Sales Rep role did in this role play was: _____

2. The worst thing the person in the Sales Rep role did in this role play was: _____

3. This person needs to review: _____

4. The person in the Sales Rep role could help train others in: _____

5. Overall, how effective (1 – 10) was the person playing the Client?
1 2 3 4 5 6 7 8 9 10

6. What was the best thing this person did in this role play as a Client? _____
