Sales Call Planning

How to Make It Work Efficiently

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SAMPLE “COMPLETED” SALES CALL PLAN

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

CLIENT ATTENDEES  TITLE  STAFFING CO. ATTENDEES
1. Jane Smith  HR Supervisor  1. Carol Kay
2. John Doe  MGR. Telemarketing  2. Kathy T. (Telemarketing Recruiter)
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”
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;
Introduce specialist from office who handles all telemarketing recruiting.
Name these firms and supply contact info.
Bring completed review forms.
Bring sample of longevity bonus.
Have Kathy T. relate current clients’ positive comments.

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)
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<th>CLIENT ATTENDEES</th>
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**CALL OBJECTIVES (A call objective must have a valid business reason.)**

M
P
V

**ANTICIPATED “ADVANCE” ACTION (How will you move this sale forward?)**

DESCRIPT 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
CRITIQUE AND ROLE PLAY FORM

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? ____________________________________________