

SALES CALL PLANNING CHECKLIST

Regardless of where you are in the sales process, use these 6 questions to create a strong foundation for your sales calls.

1. WHAT IS THE BUYER'S CURRENT SITUATION?

If you can't confidently answer this question, you should:

- Generate a list of questions that will help you move quickly through tactical situational discovery.
- Research recent changes at their company (e.g., shifts in the C-suite or board, mergers and acquisitions, new products and services).
- Research recent changes in their industry (e.g., regulations, market behavior, emerging technologies, supply chain).
- Research their competitors and competing product lines.
- Review quarterly earnings reports if publicly available.
- Research the buyer (e.g., what they post about on social media, if they're new or established in their role, previous workplaces, shared connections, their other interests).

2. WHAT ARE MY GOALS FOR THIS BUYER?

Different goals for your buyers will make for very different sales conversations.

- Is this the discovery meeting where we get to know each other and build rapport while learning how I might be able to help them?
- Is this a current customer to whom I'm introducing a new set of products or services?
- Am I reviewing the results from the previous year with a customer and this is the meeting where I resell my value so the customer stays loyal?
- Am I looking to cross-sell or up-sell currently available products and services because I see where they can add value for the buyer?
- Am I trying to supplant a competitor?

- Is this a current customer where I work in one of their divisions and I'd like to get introductions into the other three divisions where I can also help?
- Is this a buyer with so much potential that I'd be willing to travel on my dime to five cities to visit their branch outlets and their competitors, and then put together a presentation and value proposition so compelling the buyer resolves to work with us on the spot?

3. WHAT IS MY DESIRED OUTCOME FOR THIS CALL?

Know the next step. Maybe you want to:

- Leave with a promise for an introduction to the other decision makers.
- Find out what caused the service breakdown in the past and get the customer to reconsider us in the future.
- Clarify exactly what the buyer is trying to do with their new product launch and see where we can be of value so we can move to proposal.
- Review our latest proposal and get commitment to move ahead.

4. WHAT ARE MY RELATIVE STRENGTHS?

Some strengths that can help you include:

- We have a relationship with a board member who has the CEO's ear.
- One of our offices is five miles from the buyer's main plant.
- We know the buyer is unhappy with their current provider (and we know why).
- The buyers attended a training program our president conducted and wrote a great evaluation.
- The current CFO worked at our firm for three years and still maintains contact with two of our division leaders.

5. WHAT ARE MY RELATIVE VULNERABILITIES?

Some vulnerability that may affect your success include:

- I have less experience than the competition.
- I'm still learning about our new service offering and am not confidently fluent.
- The buyer has been working with our competitor for five years.
- Our fees tend to come in 10-15% higher than our competitors.
- We're not well known in this vertical.
- We lack readily available social proof (e.g., case studies, testimonials, reviews).

6. WHAT ACTIONS DO I NEED TO TAKE BEFORE THE NEXT CALL?

By taking the time to answer questions 1 through 5, your sales call planning to-do list will be as good as it possibly can be because your actions will be:

- Informed by the knowledge of your buyer's situation
- Guided by your goals for the buyer from a sales perspective
- Built to help you achieve your desired outcomes
- Planned with the knowledge of your relative strengths and vulnerabilities in this particular sales situation