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Preparing for & Launching a Sales Call

The Prep Process

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# W Sales and Business Marketing Program

WESTERN MICHIGAN UNIVERSITY

Module 4

Another Chapter in the Journey to becoming a Sales Pro!

# OnSELLING

current topics >>>

## Win Before You Begin!

True sales professionals understand that the time they spend with a potential customer is the most important and valuable time (for all parties involved), and thus they ensure that time is well spent by preparing fully and launching the interaction smartly. In the compressed and busy lives of most people there is no room for a meeting that is unfocused and wanders. Thus, this module is all about getting ready to win before you meet and getting the meeting off and running in a smart and effective way. Selling is hard, and it gets even harder if you don't set yourself up to be moving towards the win from moment #1.

## PROFESSIONAL Salespeople

### Don't "Wing-It!"

*Time with customers is precious, so be sure your actions reflect that.*

*We know how hard it is to secure time with a potential or even current customer. People are busy and any time they carve out to meet with you is precious. Treat it as so by preparing for that time so that the interaction is as efficient and effective as possible. Smart preparation ultimately leads to better meetings and saved time, and it is a critical part of being a successful professional salesperson.*

### Effective Preparation Wins on Two Levels...

#### SAVES TIME

The time you spend up front preparing for the meeting ensures that the meeting happens efficiently, and this ultimately saves you time in the long run. Unfocused meetings take extra time, poorly schemed approaches take extra meetings, and poorly managed interactions end in failure. All of these time-wasting outcomes can be cured through preparation.

#### CREATES MORE WINS

We don't question the idea that more prepared sports teams or symphonic bands win more often, so why do we deny this equation in a similar performance-based activity like selling. It is ineffective and expensive to be live with a customer when we should still be in preparation and rehearsal mode. You might not get a second choice so make your opportunities count with effective preparation.

Mark your calendars...

## Great Lakes High School Sales Challenge

Two Events: Speed Selling & Role Play  
Two Rounds: e-Round and On-Campus. Dates & details can be found on the GLHSSC web site:

[www.wmusaleschallenge.com](http://www.wmusaleschallenge.com)

### DON'T BE STUPID! Poor preparation leads to....

#### Stupid Questions

Never ask questions that you could have easily found out the answer to ahead of time such as "what do you do here?"

#### Stupid Approaches

Not having the resources & knowledge you need ahead of time create poor interactions. Through prep you can be on-target!

## Preparation Effectively >>> Look at these categories to gain quick & relevant insight



You always meet with people so take some time to gain some insight about the person / people you are going to interact with.

**EDUCATION:** There is a difference between the way an engineer and a human resources person sees the world based on their education.

**WORK HISTORY:** The path they have took to their current position has influenced the way this person sees the challenges they face.

**AFFILIATIONS:** Both socially and professionally, the groups a person joins says something about their approach to their job.

**INTERESTS:** People like to talk about their interests, and often these interests also give you persuasive insights.

Be sure you understand some of the fundamentals of the organization that the people you meet with are embedded within.

**BUSINESS MODEL:** How do they make money? What do they sell? What is their main purpose? ALWAYS understand this!

**NUTS & BOLTS:** How big? Where? Number of people? Etc.

Be sure you have the basic snapshot of the organization.

**SELF-IMAGE:** What words do they use to define themselves? What are their mission and values? Know the way they see themselves.

**CULTURE:** What are the norms and patterns of this organization? Are they formal or informal? Are they cautious or risk-taking?

## GOAL: Gain **INSIGHT** (NOT just facts & figures!)

### Connections

Can you build rapport via something you discovered?

### Solutions

Does research suggest that certain solutions are more likely?

### Questions

Do you discover gaps that can be filled with smart questions?

### Persuasion

Does your understanding of the situation suggest certain persuasion approaches?

## The **RULE**>>> **1 to 1 Prep**

When you have a meeting planned, dedicate preparation time on a **1 to 1 basis**.

Thus, if you have a 30 minute meeting scheduled, at absolute minimum you should prepare for at least 30 minutes

As a rookie, this equation might need to be 2 to 1 or 3 to 1 level!

### **DON'T FORGET REHEARSAL TIME**

Beside getting ourselves ready for the meeting to be efficient and effective, we also might need to rehearse our approaches and performance to ensure that we are on top of our game when we are live with the customer.

## The Meeting Flow & Function

Meetings can basically be broken down into three parts and it is your job to prepare for and manage the flow and function of these parts

### THE LAUNCH

The approach you use to connect to the other humans and then shift into the business part of the meeting.

### THE CORE

The fundamental purpose of the meeting. This might have multiple aspects (work through an entire sales process) or be highly focused (just determine needs).

### THE CLOSE

Secure the commitment to the next appropriate step in the process. You should always have a "next step" focus.

### Basic Start Mechanics

#### RELAX (and SMILE!)

Take a deep breath and enter with confidence (even if you aren't!)

#### GREET PROFESSIONALLY

Slowly say your name and company and shake hands

#### SEEK PERMISSION

Be polite and ask to sit and ask if you can use their desk of table.

#### PROVIDE BUSINESS CARD

Provides a cheat sheet as to who you are to help buyer  
Don't ask for one in return.

**START LIKE A PRO!**

# Setting the Foundations

*In a first meeting, be sure you have a foundational understanding of them, and they have a foundational understand of you. It could be the best 3 minutes you spend all day!*

## They Understand You: THE COMPANY INTRODUCTION

Whether they are asking you directly or not, if this is a first meeting they are wondering if you are really a worthy company / person to meet with. In addition, they might not really know that much about you and your company. That is where the 90 second company introduction comes into play. Take a moment to establish some basic credibility, highlight some key competitive advantages, and introduce the most typical ways in which you deliver value to your customers, and do this all in under 90 seconds. A document can help keep you time disciplined and help the buyer follow along.

An EXAMPLE: "Can I take 90 seconds to introduce you to Crystal Mountain Resort...."

60 Years – Paragon Award – Top Resort  
Effective Meetings  
Relaxing Accommodations  
Great Food Fun Activities  
Family Run – Great Location – Holistic

**Credibility Factors:** 2-3 reasons any customer should consider you a worthy option

**Core Value Delivered:** In plain English what do you provide your customers

**Competitive Factors:** 2-3 elements that are in your favor competitively

## You Understand The: THE CUSTOMER CONFIRM

You have taken the time to research your potential customer, so basically do the same thing, but focus it on them and confirm with the buyer that you understand the basic elements of their company.

Example for MME: "Can I take another 90 seconds and confirm what I know about the MME...."

Annual Conference – Summer Academy  
Professional Development  
Network Expansion  
Collaboration  
Teacher Run – Serving the Members

**Customer 101:** 2-3 key facts that help define who this customer is

**Core Value Delivered:** In plain English what they provide to their customers

**Competitive Factors:** 2-3 elements that are in their favor competitively

### Wrap it up and move to the meeting core...

"With the foundations set, let move to the most important part of the meeting and gain a better understanding of your challenges...." (or whatever core is!)

The Core  
of the  
Meeting

ask the alumni >>>

**Q:** Why is preparation so key?

**A:** "Winging it never works! You need to craft a game plan and know the basics about the person and company if you plan to have a successful meeting. Being prepared creates credibility and confidence, and that leads to productive meetings and closing the sale!"



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## C.L.A.P. Model

### CONNECT

Do a bit of research and start the meeting by connecting on a personal or business issue of relevance to the buyer. Perhaps it is a sports team they cheer for, the opening of a new company facility, or a person you have as a common connection, but start with some rapport building discussion to break ice and build comfort.

### LOGISTICS

Show your professionalism immediately and ensure you are not going in the wrong direction by verifying two key logistics: (1) Time ("do we still have 20 minutes today?) and (2) People ("Does anyone else need to join us?"). Most of the time you will get the answers you expect, but it never hurts to be a pro or catch a problem early!

### AGENDA

You are responsible for the process and flow of the meeting, so take the time to create and share a basic agenda. Think in two parts (1) the big picture of the whole process, and (2) the specific goals and process for today's meeting. **BEST PRACTICE:** Put this in writing, turn it towards the buyer, and make this show and tell! Verify the agenda is good with buyer.

### PERMISSION

It is now time to get to the core of the meeting and a polite and efficient way to do that is with a simple permission question: "Is it all right if we get down to business and....(whatever the core or first task is)."

**CLAP – It is a simple formula to start any meeting effectively!**

### final thoughts...

When you adopt the attitude and actions of a "win before you begin" salesperson you make best use of yours and the buyer's time and greatly increase your potential for success!