

Making a Sales Call

The sales call is one of the most crucial tasks that a business owner (particularly a service provider) will have to take on. Many people can become uncomfortable with the prospect of a face to face interview with a potential customer. The best way to get around these feelings is to be prepared.

Your profession, as well as your personality, will determine how much time and energy you invest in preparation. You'll need more time to prepare if you are presenting a proposal in an initial interview, or if you provide a service that is complex and requires that you present several options in the sales call.

Preparing to meet your prospective client

By the time you're ready to conduct sales interviews with prospective buyers, you know quite a bit about them. You've met them before or talked to them on the phone. Review your notes and ask yourself two important questions: Why is this person seeing me? What needs might this person have that I am able to fulfill?

Answering these questions will also give you confidence because you'll see the many possible ways your buyer could use your services.

Next, identify what results or benefits your prospective buyer would get out of working with you. Make this picture very clear in your mind. Then, anticipate any questions, objections, or concerns your prospective client might have. You want to use effective reasoning when answering, as well as striking a positive tone. **Practice your presentation out loud.**

What can you take along to reinforce the messages you'll give to your prospective buyer? This might be your company brochure, of course, but it also might be something more specifically related to this sales call or the names and phone numbers of two former clients who have agreed to act as references. Whatever you take should anticipate what your prospective buyer is interested in. It should also establish your credibility.

Next, ask yourself what you want to achieve during the call. What, in other words, are your objectives? Obviously, you want to sell your services, but selling services may require more than one visit. So, set your optimum objective as making the sale, but choose another objective as well. This other objective might be that your prospective client, consider your services seriously enough to ask you to prepare a proposal or to meet with the other partners in the business. Be determined to make something happen and keep the door open, even if it's just to agree to talk again in a month or so. If you know what you want before going into the meeting, it's likely that you will get it. You'll conduct the sales interview in a more focused, directed way that leads to the best possible outcome for everyone. If you don't plan, you're apt to wander through the interview and leave with little accomplished.

Making a Sales Call

Sales Call Template

Client's name: _____ Phone: _____

Decision maker: Yes [] No [] ? _____

City: _____ Province: _____ Postal Code: _____

Appointment date: _____

1. Why is this person seeing you?
2. What needs might your buyer have that your service can fill?
3. What results might the client achieve by buying your service?
4. What objections and concerns might you hear?
5. What is your response to these objections?
6. What do you need to take with you?
7. What are your objectives?
8. What specifics will you need to find out during the interview?

Gathering your materials

Travel light. Carry only what you need for the interview. You can carry everything else in your vehicle.

- (a) a quality pen that works,
- (b) essential notes (The rough draft of the proposal and the notes you took during the telephone conversation are not essential; leave them in the back seat of the car),
- (c) a few of your business cards, easily accessible (not buried in a purse or briefcase),
- (d) paper to take notes on (a simple pad will do), and
- (e) a compact leather folder that holds all of the above neatly.

The key is to make your first impression work for you. At the very least, you want to neutralize any negative perceptions and reduce distractions. Remember to concentrate on the total image that you want to portray to this potential customer.

For More Information

Books: If You're Clueless About Selling and Want to Know More
Seth Godin