

# **Up-A-Notch™ Sales Training System for Outside Salespeople**

By Dave Kahle

“Organizing a Sales Call- The Basics”

Participant’s Guide

# **Organizing a Sales Call- The Basics**

## **Notes & Exercises**

## Notes

While most of what you do can be done \_\_\_\_\_ or \_\_\_\_\_ by someone else, not all of what you do fits into that category. There is one thing that no one can do as \_\_\_\_\_ as \_\_\_\_\_. And that one thing is – \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_ with your \_\_\_\_\_. If it weren't for that – you'd be \_\_\_\_\_.

Meeting \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_ with your customers is the \_\_\_\_\_ of the sales process.

Most surveys of how salespeople spend their time indicate that the average \_\_\_\_\_ spends anywhere from \_\_\_\_\_ to about \_\_\_\_\_% of their working week actually meeting with customers. Imagine that.

To begin, let's think about the most basic steps of the sales process. What you do when you speak with your customers is this:

- \* You make them \_\_\_\_\_ with you.
- \* You find out what they \_\_\_\_\_.
- \* You describe what you \_\_\_\_\_.
- \* You show how what you \_\_\_\_\_ helps them get what they \_\_\_\_\_.
- \* You get their \_\_\_\_\_ to take the next \_\_\_\_\_.

That simple five-step process is basic to every interaction you have with your customer. It's the heart of \_\_\_\_\_. It can take months to complete in an intricate sales \_\_\_\_\_, or it can be whisked through in two minutes over the \_\_\_\_\_.

Let's examine the process and consider how to master it. When you master it, you'll be able to use it effectively countless times throughout the week.

Now I describe this process as *managing a sales interaction*. *Managing* describes \_\_\_\_\_ major role. Your primary role is to \_\_\_\_\_ the \_\_\_\_\_ process between you and your customer.

*Interactive* refers to the notion that the \_\_\_\_\_ is \_\_\_\_\_ - \_\_\_\_\_, not one-way. It consists of \_\_\_\_\_ between you and your customer. Selling isn't \_\_\_\_\_. If anything, the \_\_\_\_\_ your customer \_\_\_\_\_, and the less talking you do, the more \_\_\_\_\_ the sales call is.

*Sales* refers to the fact that this communication is moving toward an \_\_\_\_\_ between the \_\_\_\_\_ of you.

Finally, it's a \_\_\_\_\_. That means it's an honest exchange of \_\_\_\_\_, facts, \_\_\_\_\_, and \_\_\_\_\_.

Now, understanding the definition of the process, the question is "How do you manage an interactive sales dialogue so that the chances of its success are enhanced?"

**The first step is to Get to the batter's box (Help them feel comfortable with you.)**

Getting to the batter's box means that you have created a \_\_\_\_\_ of \_\_\_\_\_ and \_\_\_\_\_ in the customer.

Once you've achieved that, you can move on to the next step -- getting to first base. In sales, that means \_\_\_\_\_ the customer.

This is the time to implement all the \_\_\_\_\_ skills we discussed in earlier sessions. Use them effectively, and you'll do a \_\_\_\_\_ job of getting to first base.

In baseball, once you've gotten to first base, your next goal is second base. So too, in sales, once you've acquired an \_\_\_\_\_ of your customer, it's time to \_\_\_\_\_ your product/service or \_\_\_\_\_.

From there, third base is the goal. In sales, that means describing how your product/service/offering will impact the \_\_\_\_\_ - your \_\_\_\_\_.

In baseball, nothing really matters until someone crosses \_\_\_\_\_ plate. Only then does the score change, and all your effort \_\_\_\_\_. So, too, in sales. Nothing really \_\_\_\_\_ until you get an \_\_\_\_\_ from the customer to take the \_\_\_\_\_ step.

*Let's begin with this principle.*

**Principle: Presentations are always about two subjects: your offering and your customer.**

One of the most common mistakes that salespeople often make is this—they focus their presentation on \_\_\_\_\_ – forgetting to talk about the \_\_\_\_\_.

To be effective, you need to sift through all the features of the product/service, select those that are most important, and relate them to the \_\_\_\_\_. Here's how you do that.

**Step One. Describe your best understanding of the customer's \_\_\_\_\_.**

Begin your presentation with a restatement of what your \_\_\_\_\_ wants to \_\_\_\_\_ – the problems to be overcome or the objectives to be gained.

**Step Two. Identify the salient \_\_\_\_\_ of your product or service.**

Features are \_\_\_\_\_ of your product/service/offering.

**Step Three. Communicate the \_\_\_\_\_ with \_\_\_\_\_ and \_\_\_\_\_.**

**Step Four. Translate the features into specific \_\_\_\_\_.**

When you translate a feature into a benefit, the subject of your sentence \_\_\_\_\_.

When you're describing a feature, you talk about \_\_\_\_\_. When you're describing a benefit, you talk about \_\_\_\_\_.

**Step Five. Render those into descriptions of positive emotions.**

# **Exercise One: Analyzing a Recent Sales Call**

Directions: Analyze a sales call that you made in the last couple of days. Apply the concepts discussed in today's video. Work by yourself and fill in the form below.

Person called on: \_\_\_\_\_

Company name: \_\_\_\_\_

Date of call: \_\_\_\_\_ Time: \_\_\_\_\_ Duration of call: \_\_\_\_\_

1. What did you do to make this person more comfortable with you then he/she was before the call? \_\_\_\_\_

\_\_\_\_\_

2. What did you learn about the individual and/or the company that you did not know before the call? \_\_\_\_\_

\_\_\_\_\_

What did you do to prompt that learning? \_\_\_\_\_

\_\_\_\_\_

3. What did you present to the customer? \_\_\_\_\_

\_\_\_\_\_

4. What agreement did you achieve? \_\_\_\_\_

\_\_\_\_\_

## **Exercise Two:**

# **Articulating Features & Benefits**

Directions: Select a product, service or program that you sell. Then picture a specific customer. List the features of that product, service or program that you believe match that customer's needs and interests. Finally, translate each feature into a benefit for that particular customer. Remember, a feature is a specific characteristic of the offer. A benefit answers the question "What's in it for me?" A feature is about your offer, a benefit is about your customer.

Customer: \_\_\_\_\_

Product/service/program: \_\_\_\_\_

Features

Benefits

\_\_\_\_\_

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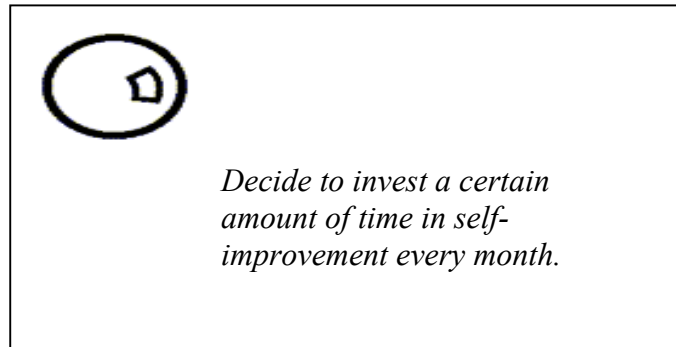
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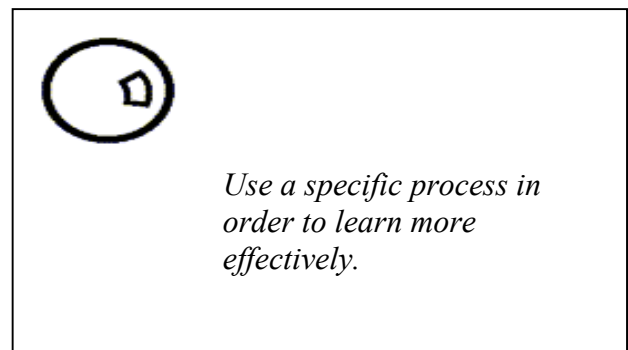
## Exercise Three: Generating Ideas

Use the bubble pads to write down at least three good ideas you gained from today's session. Remember the four criteria for a "good idea." We've illustrated a couple of samples for you.



*Remember, a good idea is one that*

- \* focuses on the future*
- \* focuses on action*
- \* focuses on your behavior*
- \* is a small step toward one of your learning goals.*



## **Exercise Four: Distilling the Best**

Select the one good idea from the previous exercise that you think is the best. To help you make that selection, ask yourself these questions:

1. Which of these ideas could make the fastest impact on my performance?
2. Which of these ideas would make the biggest impact on my performance?
3. Which of these ideas am I most passionate about?

Rewrite that idea here.

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## Exercise Five: Precisely Prescribing

Turn the idea from the previous exercise into a Precise Prescription. Write that prescription on the Rx pad. We've done an example for you. Now, take your prescription and post it someplace where it will remind you to do it.



(Precisely Prescribe)

*I will set aside two hours every week for personal improvement and keep a record of what I do in that time.*