CHAPTER 7.

The Pre-approach
Planning Your Sales Call and Presentation
Learning Objective

After studying this Chapter, you should be able:

- Explain the importance of sales call planning
- Establish effective sales call objectives
- Develop a customer benefit plan
- Describe the prospect’s mental steps in their decision making
- Explain the different types of sales presentation methods and determine the best one to use
- Better understand the importance of securing appointment
- Develop an appointment getting strategy
- Develop an effective negotiation plan
Main topics

- Strategic customer sales planning
- Planning the sales call
- Determining sales call objectives
- Getting the appointment
- Call reluctance
- Developing customer profile
- Developing customer benefit plan
- Developing sales presentation
- The prospect’s mental steps
- Sales presentation methods – Select one carefully
- The group presentation
- Negotiation so everybody wins
- What is the best presentation methods
Exhibit 7-1: The Pre-approach Involves Planning the Sales Presentation

1. Prospecting
2. Preapproach
3. Approach
4. Presentation
5. Trial close
6. Determine objections
7. Meet objections
8. Trial close
9. Close
10. Follow-up
Exhibit 7:1b: The Third Step in the Sales Process is the First Step in the Sales Presentation

- The sales presentation method determines how you open your presentation.

1. Prospecting
2. Preapproach
3. Approach
4. Presentation
5. Trial close
6. Determine objections
7. Meet objections
8. Trial close
9. Close
10. Follow-up
1. Strategic Customer Sales Planning
The Pre-approach

- **Strategic problem solving involves**
  - Strategic needs
  - Creative solutions
  - Mutually beneficial agreements

- **Customer relationship model**
  - Consultative selling
Exhibit 7-2: Consultative Selling
Customer Relationship Model

- Customer strategic needs
- Salesperson's creative solutions
- Mutual beneficial agreements
- Long-term relationships

Performance Goals
- Costs
- Productivity
- Sales
- Profits
Strategic Customer Sales Planning
The Pre-approach cont

➢ Reasons for planning the sales call

Builds confidence

Develops atmosphere of goodwill

Reflects professionalism

Generally increases sales
2. Planning the Sale Calls

Reasons for planning the Sale Calls

+ Build self-confidence
+ Develop an atmosphere of goodwill
+ Create professionalism
+ Increase sales
2. Planning the Sale Calls

Steps in the pre-approach:

PLANNING THE SALES CALL

- Determine sales call objective
- Develop customer profile
- Develop customer benefits
- Develop sales presentation
Elements of sales call planning

- Determining the sales call objective
- Developing or reviewing the customer profile
- Developing a customer benefit plan
- Developing the individual sales presentation based on the sales call objective, customer profile, and customer benefit plan
3. Determining Sale Calls Objectives

- Determine sales call objective
- Develop customer profile
- Develop customer benefits
- Develop sales presentation
3. Determining Sale Calls Objectives

+ The pre-call objectives
+ Focus & flexibility
+ Making the objective specific
+ Moving towards your objectives
+ Set an objectives for every call
3. Determining Sale Calls Objectives

+ The pre-call objectives

+ Focus & flexibility

+ Making the objective specific
3. Determining Sale Calls Objectives

* The pre-call objectives

* Focus & flexibility

* Making the objective specific

**Set a SMART call objective**

+ Specific
+ Measurable
+ Achievable
+ Relevant
+ Time bounded
3. Determining Sale Calls Objectives

+ A sampling of sales call objectives:

- Establish rapport with your prospect
- Find out your prospect’s specific problems or needs
- Find out if your prospect can afford your product
- Determine who the competition is
- Determine important purchasing criteria
- Etc
4. Getting an appointment

➤ The telephone – a useful sales tool

+ Establish your objectives
+ Prepare an opening statement
+ Briefly outline your message
+ Ask for what you want
+ Prepare for possible objections
+ Briefly about key buying motives to prepare for meeting
+ Confirm all contact information
+ Thank them for their time
+ provide a reminder
4. Getting an appointment

- Believe in yourself
- Develop friends in the prospect’s firm
- Call at the right time on the right person
- Do not waste time waiting
5. Call Reluctance Costs You Money!

- Call reluctance refers to not wanting to contact a prospect or customer.

- For many salespeople, owning up to call reluctance is the most difficult part of combating it.
Exhibit 7-5: The 12 Faces of Call Reluctance

Think you might suffer from call reluctance? See if you fit one of the 12 classic types identified by researchers George Dudley and Shannon Goodson. They’re listed in order from most common to least common.

1. **Yielder**
   Fears intruding on others or being pushy.

2. **Overpreparer**
   Overanalyzes, underacts.

3. **Emotionally unemancipated**
   Fears loss of family approval, resists mixing business and family.

4. **Separationist**
   Fears loss of friends, resists prospecting among personal friends.

5. **Hyper-pro**
   Obsessed with image, fears being humiliated.

6. **Role rejector**
   Ashamed to be in sales.

7. **Socially self-conscious**
   Fears intruding on others or being pushy. Intimidated by upmarket customers.

8. **Doomsayer**
   Worries, won’t take risks.

9. **Telephobic**
   Fears using the telephone for prospecting or selling.

10. **Stage fright**
    Fears group presentations.

11. **Referral aversions**
    Fears disturbing existing business or client relationships.

12. **Oppositional reflex**
    Rebuffs attempts to be coached.

How to Conquer the Fear

- First and foremost, you must admit to having call reluctance. Acknowledgment is a major step toward recovery, but it’s not an easy move. Denial is the most frequent companion of call reluctance, and the problem is sometimes hard to identify. Salespeople “typically know something is wrong, but they may not know what it is,” says behavioral scientist and call reluctance expert George Dudley. “Many who do know they are experiencing sales call reluctance don’t feel secure admitting it to management, because many sales organizations still tend to feature cultlike, unrealistic emphasis on maintaining a positive attitude,” Dudley explains.

- Second, determine your call reluctance type and adopt appropriate countermeasures. The numerous prescriptions often involve clearly and specifically identifying your fears or negative thoughts. Then you can tackle them head-on, one at a time. In a sense, curbing call reluctance is like breaking a bad habit. Some salespeople find token reward systems helpful; others use relaxation techniques. In one countermeasure known as thought zapping, you place a rubber band around your wrist. When a negative thought intrudes, you snap the rubber band sharply and immediately conjure up a positive mental image of yourself—recalling, for example, a time when you did well in a similar situation.

- Third, follow up, keep plugging, make calls. Taming call reluctance is work, and for many salespeople it takes continuous effort. “Don’t confuse a change in your outlook with a change in the number of contacts you initiate with prospective buyers,” Dudley warns. If you’re call reluctant, take heart in the knowledge that your problem actually may be a sign of commitment to selling. “Salespeople who are not motivated or goal-focused can never be considered call reluctant,” says Dudley. Salespeople with authentic call reluctance care very much about meeting prospecting goals. “You simply cannot be reluctant to get something you don’t want in the first place.”
6. Develop customer profile

**Customer profile**

Collect and review as much relevant information as possible regarding the firm, the buyer & individuals who influence the buying decision.
### Exhibit 7-6: Information Used in a Profile and for Planning

**Customer Profile and Planning Sheet**

1. Name: ____________________________
   Address: __________________________

2. Type of business: __________________
   Name of buyer: ____________________

3. People who influence buying decision or aid in using or selling our product: __________________

4. Buying hours and best time to see buyer: __________________

5. Receptionist’s name: __________________

6. Buyer’s profile: ____________________

7. Buyer’s personality style: __________________

8. Sales call objectives: __________________

9. What are customer’s important buying needs: __________________

10. Sales presentation: __________________
    a. Sales approach: __________________
    b. Features, advantages, benefits: __________________
    c. Method of demonstrating FAB: __________________
    d. How to relate benefits to customer’s needs: __________________
    e. Trial close to use: __________________
    f. Anticipated objections: __________________
    g. Trial close to use: __________________
    h. How to close this customer: __________________
    i. Hard or soft close: __________________

11. Sales made—product use/promotional plan agreed on: __________________

12. Post sales call comments (reason did/did not buy; what to do on next call; follow-up promised): __________________
6. Develop customer profile

Customer relationship management

It has been simplified by the development of contact management software, which allows professional sales individuals to accumulate and manage large amount of customer data.
7. Developing a customer benefit plan

+ **Step 1:** Select FAB of your product to present to your prospect

+ **Step 2:** Develop your marketing plan (displays, advertising, proper shelf space, positioning, pricing etc)

+ **Step 3:** Develop your business proposition (price, percentage markup, margin ROI, payment etc)

+ **Step 4:** Develop a suggested purchase order based on a customer benefit plan.
Exhibit 7-7: Examples of Topics Contained in the Marketing Plan Segment of Your Sales Presentation

<table>
<thead>
<tr>
<th>Resellers</th>
<th>End Users</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Advertising</td>
<td>1. Availability</td>
</tr>
<tr>
<td>■ Geographical</td>
<td>2. Delivery</td>
</tr>
<tr>
<td>■ National</td>
<td>3. Guarantee</td>
</tr>
<tr>
<td>■ Regional</td>
<td>4. Installation</td>
</tr>
<tr>
<td>■ Local</td>
<td>■ Who does it?</td>
</tr>
<tr>
<td>■ Co-op</td>
<td>■ When?</td>
</tr>
<tr>
<td>■ Type</td>
<td>■ How?</td>
</tr>
<tr>
<td>■ Television</td>
<td>5. Maintenance/service</td>
</tr>
<tr>
<td>■ Radio</td>
<td>6. Training on use</td>
</tr>
<tr>
<td>■ Direct-mail</td>
<td>7. Warranty</td>
</tr>
<tr>
<td>■ Internet</td>
<td></td>
</tr>
<tr>
<td>2. Sales Promotion</td>
<td></td>
</tr>
<tr>
<td>■ Contests</td>
<td></td>
</tr>
<tr>
<td>■ Coupons</td>
<td></td>
</tr>
<tr>
<td>■ Demonstrations</td>
<td></td>
</tr>
<tr>
<td>■ Samples</td>
<td></td>
</tr>
<tr>
<td>■ Sweepstakes</td>
<td></td>
</tr>
<tr>
<td>■ POP displays</td>
<td></td>
</tr>
<tr>
<td>3. Sales Force</td>
<td></td>
</tr>
<tr>
<td>■ Working with their salespeople</td>
<td></td>
</tr>
<tr>
<td>4. Trade Shows</td>
<td></td>
</tr>
</tbody>
</table>
### Exhibit 7-8: Examples of Topics Contained in the Business Proposition Segment of Your Sales Presentation

<table>
<thead>
<tr>
<th>Resellers</th>
<th>End Users</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. List price</td>
<td>1. List price</td>
</tr>
<tr>
<td>2. Shipping costs</td>
<td>2. Shipping costs</td>
</tr>
<tr>
<td>3. Discounts</td>
<td>3. Discounts</td>
</tr>
<tr>
<td>- Cash</td>
<td>- Cash</td>
</tr>
<tr>
<td>- Consumer</td>
<td>- Quantity</td>
</tr>
<tr>
<td>- Quantity</td>
<td></td>
</tr>
<tr>
<td>- Trade</td>
<td></td>
</tr>
<tr>
<td>- Financing</td>
<td>4. Financing</td>
</tr>
<tr>
<td>- Payment plans</td>
<td>- Payment plans</td>
</tr>
<tr>
<td>- Interest rate</td>
<td>- Interest rates</td>
</tr>
<tr>
<td>4. Markup</td>
<td>5. ROI</td>
</tr>
<tr>
<td>5. Profit</td>
<td>6. Value analysis</td>
</tr>
</tbody>
</table>
8. Developing a sales presentation

- The salesperson presenting the proposition in relation to the buyer’s need.

- Planning the sales presentation involves developing steps 3 – 9 of the sales presentation:
  - Approach
  - Presentation
  - Trial close

- Deciding on the appropriate method etc.
Exhibit 7-9: Major Phases in Your Presentation: A Sequence of Events to Complete in Developing a Sales Presentation

1. Approach
   - Rapport-building
   - Uncover needs
   - Attention, interest, transition

2. Fully discuss your product
   - Features
   - Advantages
   - Benefits

3. Present your marketing plan
   - How to resell (for reseller)
   - How to use (for consumers and industrial user)

4. Explain your business proposition
   - What’s in it for your customers?

5. Suggested purchase order
   - Recommend what to buy in order to fill their needs uncovered in the presentation

6. Close
   - Ask for the business!

7. Exit
   - Do not give up!
   - Act as a professional
   - Leave the door open
9. The Prospect’s Mental Steps

The Prospect’s Five Mental Steps in Buying

- Attention
- Interest
- Desire
- Conviction
- Purchase
Overview of the Selling Process

➢ Get the prospect’s attention and interest by having the prospect recognize a need or problem, and state a wish to fulfill the need or solve the problem

➢ Uncovering and answering the prospect’s questions and revealing and meeting or overcoming objections results in more intense desire

➢ Desire is transformed into the conviction that your product can fulfill the prospect’s needs or solve problems
### Exhibit 7-11: The Selling Process and Examples of Prospect’s Mental Thoughts and Questions

<table>
<thead>
<tr>
<th>Steps in the Selling Process</th>
<th>Prospect’s Mental Steps</th>
<th>Prospect’s Potential Verbal and Mental Questions</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Prospecting</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Salesperson locates and qualifies prospects</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. Preapproach</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Salesperson determines sales call objective, develops customer profile, customer benefit program, and selling strategies. Customer’s needs are determined.</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Attention</strong> due to arousal of potential need or problem.</td>
<td>Should I see salesperson?</td>
</tr>
<tr>
<td></td>
<td><strong>Interest</strong> due to recognized need or problem and the desire to fulfill the need or solve the problem.</td>
<td>Should I continue to listen, interact, devote much time to a salesperson?</td>
</tr>
<tr>
<td></td>
<td></td>
<td>What’s in it for me?</td>
</tr>
<tr>
<td>3. Approach</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Salesperson obtains interview, meets prospect, and begins individualized sales presentation. Needs are further uncovered.</td>
<td></td>
<td>Is the salesperson prepared? Are my needs understood? Is the seller interested in my needs?</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Should I continue to listen and interact?</td>
</tr>
<tr>
<td></td>
<td></td>
<td>So what? (to statements about features)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Prove it! (to statements about advantages)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Are the benefits of this product the best to fulfill my needs?</td>
</tr>
<tr>
<td>4. Presentation</td>
<td><strong>Interest</strong> in information that provides knowledge and influences perceptions and attitude.</td>
<td></td>
</tr>
<tr>
<td>Salesperson relates product benefits to needs, using demonstration, dramatizations, visuals, and proof statements.</td>
<td><strong>Desire</strong> begins to develop based on information evaluation of product features, advantages, and benefits. This is due to forming positive attitudes that product may fulfill need or solve problem. Positive attitudes brought about by knowledge obtained from presentation.</td>
<td></td>
</tr>
</tbody>
</table>
### Exhibit 7-11b: The Selling Process and Examples of Prospect’s Mental Thoughts and Questions

<table>
<thead>
<tr>
<th>Step</th>
<th>Desire continuance and thought process</th>
<th>Objection or belief process</th>
</tr>
</thead>
<tbody>
<tr>
<td>5. Trial Close</td>
<td><em>Desire continues based on information evaluation.</em></td>
<td>Do I understand the salesperson’s marketing plan and business proposition? I need more information to make a decision. Can you meet my conditions?</td>
</tr>
<tr>
<td>6. Objections</td>
<td><em>Desire continues based on information evaluation.</em></td>
<td>Let me see the reaction when I give the salesperson a hard time. I have a minor/major objection to what you are saying. Is something nonverbal being communicated? Did I get a reasonable answer to my objection?</td>
</tr>
<tr>
<td>7. Meet Objections</td>
<td><em>Desire begins to be transformed into belief. Conviction established due to belief the product and salesperson can solve needs or problems better than competitive products. Appears ready to buy.</em></td>
<td>Can I believe and trust this person? Should I reveal my real concerns?</td>
</tr>
<tr>
<td>8. Trial Close</td>
<td><em>Conviction becomes stronger.</em></td>
<td></td>
</tr>
</tbody>
</table>
10. Sales Presentation Methods - Select one carefully

Salespeople face numerous situations

+ Salesperson to buyer
+ Salesperson to buyer group
+ Sales team to buyer group
+ Conference selling
+ Seminar selling
Sales Presentation Methods—Select One Carefully

Four sales presentation methods

1/ The memorized sales presentation
   Salesperson’s role is to develop initial stimulus into an affirmative response to an eventual purchase request

2/ The formula presentation
   The salesperson follows a less structured, general outline in making a presentation, allowing more flexibility and less direction
3/ The Interactive Need Satisfaction Presentation
   Designed to be flexible, free flowing and interactive
   Truly relational

4/ The Problem - Solution Presentation
   Salesperson often develops a detailed analysis of a prospects needs and provide highly organized solutions. Usually used in complex or technical products e.g. Insurance, accounting systems
Exhibit 7-12: The Structure of Sales Presentations

- Memorized Selling: Structured
- Formula Selling: Semi-structured
- Need-Satisfaction Selling: Unstructured
- Problem-Solution Selling: Customized
Exhibit 7-13: Participation Time by Customer and Salesperson During a Memorized Sales Presentation

- Salesperson talking time
- Customer talking time

- Approach
- Presentation
- Close

Sales Presentation Time
Exhibit 7-15: Participation Time by a Customer and Salesperson During a Formula Sales Presentation
Exhibit 7-20: Participation Time by Customer and Salesperson During Need-Satisfaction and Problem-Solution Sales Presentations
Exhibit 7-16: The 10-Step Productive Retail Sales Call

<table>
<thead>
<tr>
<th>Step No.</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1.       | Plan the call.  
|          | - Review the situation.  
|          | - Analyze problems and appointments.  
|          | - Set objectives.  
|          | - Plan the presentation.  
|          | - Check your sales materials.  |
| 2.       | Review plans.  
|          | - Before you leave your car to enter the store, review your plans, sales call objectives, suggested order forms, and so on.  |
| 3.       | Greet personnel.  
|          | - Give a friendly greeting to store personnel.  
|          | - Alert the store manager for sales action.  |
| 4.       | Check store conditions.  
|          | - Note appearance of stock on shelf.  
|          | - Check distribution and pricing.  
|          | - Note out-of-stocks.  
|          | - Perform a quick fix by straightening shelf stock.  
|          | - Report competitive activity.  
|          | - Check back room (storeroom):  
|          |  - Locate product to correct out-of-stocks.  
|          |  - Use reserve stock for special display.  
|          | - Update sales plan if needed.  |
| 5.       | Approach.  
|          | - Keep it short.  |
| 6.       | Presentation.  
|          | - Make it logical, clear, interesting.  
|          | - Tailor it to dealer’s style.  
|          | - Present it from dealer’s point of view.  
|          | - Use sales tools.  |
| 7.       | Close.  
|          | - Present a suggested order (ask for the order).  
|          | - Offer a choice.  
|          | - Answer questions and handle objections.  
|          | - Get a real order.  |
| 8.       | Merchandising.  
|          | - Build displays.  
|          | - Dress up the shelves.  |
| 9.       | Records and reports.  
|          | - Complete them immediately after the call.  |
| 10.      | Analyze the call.  
|          | - Review the call to spot strong and weak points. How could the sales call have been improved? How can the next call be improved? |
The need-satisfaction presentation

- Designed as a flexible, interactive sales presentation, yet the most challenging and creative form of selling
  - Need-development phase
  - Need-awareness phase
  - Need-fulfillment phase
Sales Presentation Methods—Select One Carefully cont...

The problem-solution presentation

- Selling highly complex or technical products
- Six steps
  * Convincing the prospect to allow the salesperson to conduct the analysis
  * Making the actual analysis
  * Agreeing on the problems and determining that the buyer wants to solve them
  * Preparing the proposal for a solution to the prospect’s needs
  * Preparing the sales presentation based on the analysis and proposal
  * Making the sales presentation
11. The group presentation

- May be less flexible than a one-on-one meeting

- The larger the group, the more structured your presentation
11. The group presentation

+ Give the proper introduction
+ Establish credibility
+ Provide an account list
+ State your competitive advantages
+ Give quality assurances and qualifications
+ Cater to the group’s behavioral style
+ Get the Group involved in the presentation
+ The proposal
+ Avoid prices
+ Summarize benefits
Sales Presentations Go High Tech

Videos
CD-ROMs
Satellite conferencing
Computer hardware and software
12. Negotiating so everyone wins

- Many salespeople negotiate during the confirming phase of the sale

- Phases of negotiation
  * Planning
  * Meeting
  * Studying
  * Proposing
13. What Is the Best Presentation Method?

- Stimulus-response
- Formula
- Need-satisfaction
- Problem-solution

“Each of these methods is the best one when the method is properly matched with the situation”
Select the Presentation Method, Then the Approach

+ Know which method to use before developing the presentation

+ Plan presentation

+ Select approach/opening
G. SUMMARY OF MAJOR SELLING ISSUES

- Careful planning of the sales call is essential to success in selling.

- Planning builds self-confidence, develops an atmosphere of goodwill, creates professionalism, and increases sales.

- Sales call planning
  * Have a sales call objective that is SMART
  * Develop or review the customer profile
  * Develop your customer benefit plan
SUMMARY OF MAJOR SELLING ISSUES (Cont)

- Master the art of giving a good sales presentation

- The sales presentation method selected should be based on prior knowledge of the customer, your sales call objective, and your customer benefit plan

- Show that you have a right to present your product because it has key benefits for the prospect

- Many different sales presentation methods are available

- There is no one best method; each one must be tailored to meet the particular characteristics of a specific selling situation or environment
THANK YOU