8 Steps to a Successful Sales Visit

From preparation to closing, remember to make these key moves.

It's always good to have a plan for your sales visits that can serve as a quick reminder of the essentials. You can use this checklist as a review before and after each sales call to make sure you cover all the bases. Leaving a sales call and wishing you had remembered to ask a specific question or show the prospect another product idea is a horrible feeling; using this checklist may help you avoid that. Edit this list based on the type of sales cycle you're involved in.

Sales Call Checklist

1. Preparation Prior to Sales Call

Did I:

- Research the account prior to the call?
- Learn something about the person and their business before the meeting?
- Send an outline of the agenda to the client before the meeting?
- Have three value-added points prepared?
- Bring all materials, brochures, contracts, etc.?
- Answer the three important pre-call questions:
  A. What is the goal of the call?
  B. What do I need to find out during the call?
  C. What's the next step after the call?

2. Greeting and Introduction

Did I:

- Observe the prospect's office décor (e.g., trophies, awards, pictures and so on)?
- Find out about the prospect's personal interests, hobbies, family and so on?
- Find out the names of contacts in the account and write them down?
- Bridge to the business topic smoothly?
- Listen more than I spoke? (Ideally, you should spend 80 percent of your time listening and only 20 percent talking.)
- Ask the customer about their business goals?
- Ask the customer what challenges the company is facing?

3. Qualifying

Did I:

- Find out who the decision-makers are by asking "Who else besides yourself might be involved in the decision-making process?"
- Ask what process they normally go through when considering a new vendor?
- Find out how and why they made the decision for their current product or service (assuming they are replacing a product or service)?
- Find out what their time frame is?
- Find out if funds have been allocated--and how much?
- Find out their specific needs?
- Ask if they could change something about their product or service, what would it be?

4. Surveying

Did I:

- Ask open-ended questions (who, what, where, when, why, how, how much, tell me about it, describe for me)?
- Ask about the corporate structure?
- Ask about the prospect's role at the company?
- Ask what's important to them?
- Ask what's interesting to them and then focus on that?
- Ask what risks they perceive?
- Ask how we can help solve their problems?
- Ask what they think about our company?
- Ask what they like and dislike about their current vendor?
- Ask how industry trends are affecting them?
- Ask "what if?" questions?
- Ask what they would like to see from a vendor and salesperson in the area of support after the sale?
- Ask what their short-term and long-term goals are?
- Ask how I can become their most valued vendor?
- Ask what is our next step?
- Establish a specific follow-up schedule?
- Parrot the prospect to encourage him to expand, elaborate and go into detail about each answer?

5. Handling Objections

Did I:

- Listen to the entire objection?
- Pause for three seconds before responding?
- Remain calm and not defensive?
- Meet the objection with a question in order to find out more?
- Restate the objection to make sure we agreed (communication)?
- Answer the objection?
- Complete the six-step process?
  1. Listen
  2. Define
  3. Rephrase
  4. Isolate
  5. Present solution
  6. Close (or next step)

6. Presentation

Did I:

- Prioritize the prospect's needs?
- Talk about benefits to the customer?
- Use layman's terms?
- Link the benefit to the prospect's needs?
- Verify each need before moving on?
- Present myself, company and product in a positive light?
- Re-establish rapport?
- Ask if anything changed since our last meeting?
- Pre-commit the prospect?
- Give a general overview of the product or service?
- Keep the presentation focused on the customer's needs?
- Involve the customer in the presentation?
- Summarize the prospect's needs and how our product or service meets those needs?

7. Closing

Did I:

- Get the customer to identify all possible problems that might be solved by my product or service?
- Get the customer to identify the value of solving the identified problems?
- Get agreement that the proposed solution provides the values identified?
- Ask for the order ("Why don't we go ahead with this?")?

8. Customer Maintenance

Did I:

- Write thank you letters for appointments, orders and so on?
- Earn the right to ask for reference letters and referrals?
- Establish a schedule for follow-up calls and customer visits?
- Ask for referrals ("Do you know three people who could benefit from my product and service like you did?")?
- Send thank you notes to lost accounts?
- Ask what are three important things we can do as a vendor to keep our relationship strong?

This checklist will help you stay focused. Every time you schedule a sales visit, run through this list before-hand to make sure you're prepared--and after the visit to see what you can do next time to make the call run more smoothly and increase your chances of success.