

Once you have a sales call or meeting set up and confirmed, you have everything you need: the person, the initial interest, and the agreed-upon time. Right?

Why leave your sales opportunities to chance?

Investing just a little time thinking about and planning your approach to a sales call or meeting will pay big dividends. A call plan will make sure you feel confident and cover all the bases.

This checklist will help you maximize your efforts. Think of it as a pre-flight, takeoff and in-flight checklist. Edit it based on the type of customers sales cycle you have. Prepare to wow your prospects!

1. Research

- Take 20 minutes to learn something about the person and their business
- If we have engaged with our prospect previously, look for notes on past interactions
- Check prospect's website and look at About Us, News, Blog, and Open Positions pages. Keep an eye out for mutual acquaintances or companies we can reference
- Check prospect's LinkedIn profile. Look for anything that I have in common with them, such as same university we attended, mutual acquaintances, or companies we both do business with I can reference
- Check our prospect's Twitter account
- Quickly search for prospect's competitors: '*company name + competitor*'. See if there is anything that stands out pointing to a challenge for the prospect
- Our company's top 3 strengths versus our competition
- Our company's top 3 vulnerabilities and how to address these before the prospect asks

2. Prospect's Situation

- Recent changes at the company such as shifts in the C-suite or board, mergers and acquisitions, or new products and services
- Recent changes have occurred in their industry such as regulations, market behavior, emerging technologies, or supply chain interruption
- Recent announcements by prospect's competitors such as new products or services launches, mergers and acquisitions, geographic expansion, or reduction in staffing
- Based what you know so far about the prospect's company and others like them, identify the need and the solution your company has that fits best, and why
- Have a list of open-ended questions ready for the call

3. Focus On The Selling Situation

- Introducing our new set of products or services to a current customer
- Follow-up to a call that didn't go as well as I'd like: resell our value
- Cross-sell or up-sell our currently available products and services
- Attempting to replace a competitor
- Get introductions into other divisions, other decision-makers or influencers

4. Goal For The Outcome Of The Meeting Or Call

- Know what I'd ideally like to accomplish
- Know what I need to find out during the call – even though I have an idea about what their problems is, I will start the conversation in discovery mode only
- Determine what the next step might look like – have a few scenarios in mind depending on what you discover and how the meeting goes
- If an initial meeting, my objective is rapport building and discovery to learn of the buyer's the current situation, underlying issues they're facing, and how we can help
- If this is a follow-up call, my objective is to clarify exactly what the buyer is trying to accomplish, reestablish our value, and move to a proposal.
- Have a minimum of 5 questions ready that are tailored to the company and people to begin diagnosing underlying issues.
- Educate to prevent objections. Based on the 5 most common objections, prepare to proactively weave information about their industry, technology, regulatory environment, or other relevant facts into the conversation – to reinforce our competitive advantages
- Always qualify: determine if there is a fit for our solution that fixes their problems
- Leave with an agreement from the buyer as to what the next step is

You are now in a great position to move the sale forward. You'll have the clarity to plan, guide, and execute the next step.

About Innovate To Win

You see the future. We help you get there faster.

Innovate To Win has a clear mission: Never again will a promising emerging company struggle to scale-up because of a lack of sales.

As trusted business advisors, we'll work closely with you to provide a path to significant, predictable, revenue growth. It's the perfect blend of selling strategies, processes, and no-nonsense actions all based on the art and science of selling.

Started by three tech business leaders with deep tech industry-specific experience and expertise, Innovate To Win delivers results with expert strategy, analysis, and advice.

If you're looking for help to deliver sales results, let's talk: 727.642.4246.