

Sales Call Planning Guide

Get it right the 1st time so you're invited back a 2nd time



Jill Konrath, Selling to Big Companies

Sales Call Planning Guide

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Creating an Awesome Initial Meeting

Congratulations on getting an appointment with a key player in your targeted account. That by itself is a major accomplishment of which you can be proud. In this workbook, you'll learn what top sellers do to prepare for their 1st meeting with important accounts. Top sellers

know this first call is a make-or-break situation for them. If they do well, they're given an opportunity to advance the sales process. If they don't, they're shoved out the door as quickly as possible.

Because of this, top sellers spend many hours preparing for this critical first meeting. They research the targeted account in depth. They scrutinize the research looking for where their products or services might add value.

Top sellers identify success stories to share, cull out the key points, and practice the stories aloud. They know exactly what the logical next step is in their sales process and set up the call to flow in this direction. They write down questions to ask and take this list into the meeting.

What top sellers do may seem like it's a lot of work, but it's the price of admission for doing work with big companies. It's why their meetings end with the prospective customer saying things like:

- "We need to keep on talking."
- "We have to get Tony involved."
- "Can you come back next week and meet with..."
- "Where can we see one of these working?"
- "How soon can we get started?"



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These are the types of responses every seller dreams of hearing at the end of their meeting. Unfortunately, more often than not they hear:

- “Thanks for your time; if we ever need one we’ll give you a call.”
- “We’ll think about it and get back to you.”
- “It’s not exactly what we were looking for.”
- “You’re too pricey for us.”

There are three critical reasons why most sellers don’t win large contracts from big companies:

1. They don’t invest enough time preparing for the meeting.
2. They don’t understand the components of an effective initial sales meeting.
3. They focus on their own offering – not the prospective company’s business needs.

This *Sales Call Planning Guide* walks you through all the steps necessary to pass the first test with a large corporate client. And, everything in here works great for smaller companies too. To get the most out of this guide, use it to prepare for a specific upcoming customer meeting.

Start your information gathering and planning at least one week prior to your scheduled meeting time. It’s a lot of work, but once you master this process the payback will be well worth it.



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Conduct Pre-Call Research

Prior to meeting with a person from a major account, it's critical to invest time understanding their business. Check out their website. Read their annual report. Do an on-line search for recent articles about them in the press. Talk to people who work in the company. Talk to others who do work with this big company. Learn as much as you can.

Failure to invest time in this area upfront significantly impacts your ability to successfully sell your product or services to large corporations. But because it easily takes 2-3 hours (or even more) to gather and read through all the information, many sellers omit this critical step.

In meeting with a potential corporate client, your knowledge of their business is the first thing that differentiates you from most of your competitors. Plus, by understanding their company, you're able to ask intelligent questions and align your offering with their needs.

Prospective customer's name

Primary business



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Business unit/division

Market segment

Financial status



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Their customers

Key strategic initiatives

Industry trends



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Determine Your Positioning

After completing your research, identify where you might have a positive impact on your targeted company. Today's corporate decision makers expect you to have some idea of the difference you can make prior to meeting with them. They won't take time to do a needs assessment with you until they know you can have a significant impact on their business. Based on your knowledge of their operation, answer the following questions:

How is the company handling things today without your product or service?

What kinds of problems or challenges might they be facing because of how they're currently doing things?



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Because of their current service or product supplier, what gaps might exist between where they are today versus where they want to be?

Looking at the problems, challenges or gaps that may be present, what are the potential business implications?

**If this company used your products or services, what business value would they realize?
What difference could it make?**



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Plan Your Questions

If you're meeting with someone from a big company, good questions are one of the best ways to demonstrate that you're committed to helping them achieve their goals and remove obstacles to success. It's imperative to write out your questions ahead of time and take them to the meeting. If you neglect this step, it's easy to slip into a "pitch" mode that customers detest. Good questions uncover information about their current situation, the problems and gaps they're experiencing, the business ramifications of how they're currently handling things and the pay-off for making a change.

List Your Top Ten Questions

1.

2.

3.



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4.

5.

6.

7.

8.

9.

10.



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Define the Meeting Outcome

As a result of this meeting, what is the logical next step? Research into sales success, shows that if you've defined an appropriate desired outcome for your sales call prior to the meeting, you're much more likely to achieve it.

While you might want to walk away from this meeting with an order, the likelihood of this happening with just one call on a big company is slim-to-none. Large corporations take time to make decisions. Often more than one person is involved in the decision process.

Think about contracts you've had with other companies. What usually happens next? Here are some "next steps" for many sellers as they establish a relationship with a major account:

- Meeting with another person involved in the decision process.
- Analysis of a specific situation or problem.
- Demonstration of their product or service.
- Proposal with their recommendations.

Define Your Logical Next Step

If your meeting with the big company goes well, what is your logical next step:



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Guidelines for an Effective 1st Meeting

Effective meetings with corporate decision makers follow a simple, proven process. Here are the steps to follow to ensure you have a productive first sales call. Please use them as guidelines, not absolutes. The timeframes below assume a one-hour meeting. And remember, good meetings focus on your prospective customers and what's important to them – not your product, service or solution. (Note: It's more likely that your meeting will occur in person, but this plan works well for phone meetings as well.)

I. Open the Conversation (5-10 minutes)

Customers from big companies don't have a lot of time for meaningless chitchat and relationship building these days. Be cordial and friendly, but business-focused at all times.

A. Make the introductions

Take a few minutes to learn about the decision maker's job and responsibilities. If the decision maker invites others to the meeting, make sure to introduce yourself and learn their names. Find out what why they're attending and what interests they have relative to the business issue.

B. Confirm times and agenda

Before you get started, double check to see if times have changed since you set up the meeting. If your customer has to run to an urgent meeting in 30 minutes, you need to adjust your game plan or come back later. Reconfirm the purpose of the meeting also to ensure there are no misunderstandings.



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You might say, “As I explained earlier, we work with high tech firms to increase brand awareness and drive sales. In our time together today, I'd like to give you a little background on how we address these issues, find out what your company is doing in these areas and see if we have grounds for further discussions. How does that sound?”

Notice the professionalism and leadership in this overview. It shows that you have a clear plan for the meeting. Decision makers feel better immediately; they know their precious time won't be wasted.

II. Lead the Discussion (40-45 minutes)

You want to create a dialogue – not make a pitch. Lay the groundwork by sharing information of high interest to your prospects. Then invite them into a discussion by asking questions that make them think.

A. Set the stage (5 minutes)

Customers need more grounding about what your company does than the brief 1-sentence description given above. When you arranged the meeting, the decision maker was enticed by something you said.

Now is the opportune time to give a brief overview of the business results a specific client achieved with your product, service or solution. Explain the challenge the customer faced, how you helped them, and the results they achieved. You can also share your insightful ideas or go over the important information you brought to the meeting. The previous chapter explains what to do in detail.



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B. Transition to questions

As quickly as you can, shift the focus to the decision maker – where it belongs. To do this, simply say, *“That should give you a good overview about how we help our customer solve their problems (or achieve their objectives). The most important thing is to find out if this makes sense for your company. In preparing for today’s meeting, I noticed that (insert data re: company’s direction, Triggering Event, other info uncovered in research). I was wondering how ...”*

Unless you plan your transition, it’s sometimes hard to stop talking – especially if you’re goaded on by questions from the decision maker. An effective transition is part of your sales call plan.

C. Focus on business issues (35-40 minutes)

Prior to the meeting develop a minimum of ten insightful, powerful questions you can use to lead a business-focused discussion. Corporate decision makers are always interested in talking about their business. They wouldn’t be taking time to meet with you unless they truly wanted help solving their problems or achieving their goals.

Have the questions handy so you can refer to them. If you want, show the client how you’ve prepared for the meeting – they’ll be impressed. But don’t give them the list of questions or they’ll just rattle off the answers.

Ask your questions in a conversational manner to accomplish these things – not like a schoolteacher giving an oral test. Questions build relationships, establish rapport, demonstrate your competence and show that you care.



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Remember, this is a discussion – not a sales pitch. Listen to their answers. Be interested. Learn as much as you can. Take copious notes of everything that's said – not just the parts you find interesting.

Always LEAN BACK. The moment you move forward, you're pitching. The discussion is over and the push is on. Your prospect immediately puts up defensive barriers and raises objections. Getting the sale is going to be infinitely harder unless you immediately recover and get back into the discovery mode.

III. Advance the Process (5 - 10 minutes)

When you focus on questions, your one-hour meeting flies by. Even if the decision maker seems oblivious to the time, it's important not to overstay your welcome. Draw attention to the clock. See if you're invited to stay longer. If not, it's time to wrap up and advance the sales process to the logical next step.

A. *Summarize your understanding*

Since it takes multiple meetings to do business with big companies, on your first call you don't try to share everything you know, ask every question you want answered or hand out every piece of collateral in your briefcase. Instead, show your professional expertise by summarizing what you learned about their critical business issues and the value of resolving them.

Corporate decision makers are also interested in learning more about how you work with customers who had similar problems, what your process was in working with them and how they benefited from working with your firm.



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Do not, under any circumstances get into a discussion of your product or service. This will be the hardest thing in the whole world for you to do, but it's essential. Remember, corporate buyers don't really care about your offering – only what it can do for them. They also realize that in a short one-hour meeting, you can't possibly offer them a well-thought out solution. They don't expect one.

B. Suggest the logical next step

Then, without making a big deal of it, simply recommend a good option to move the process forward. This is the logical next step you were working toward from the onset.

You might say, *"Usually when I work with companies on product introductions, the next step is to set up a meeting with the product manager to get a better understanding of the launch plans already in place and where gaps might exist. Can we get a meeting set up with this person in the next couple weeks?"*

If you've had a good discussion, it's highly likely that your prospect will have already suggested a next step. If so, great! Get it on the calendar. If your prospect missed an important step, offer it up as another idea, *"Ms. Biggie, I'll get going on your recommendation right away. Also, based on my experience, we need to talk with the IT department as well. Can we get that set up too?"*

Ending meetings like this advances the sales process to its next logical step. It's honest and full of integrity. It's just simply suggesting the next logical thing that you both need to do to determine if your offering is a good fit for their business.



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Initial Meeting Planning Guide

Prospective Customer:

Contact Name:

Contact Role/Responsibility:

State your desired outcome. Identify the logical next step.



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I. Open the Conversation (5-10 min.)

A. Make the introductions

B. Confirm times and agenda



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II. Lead the Discussion (40-45 min.)

A. Set the stage (5 min.)

Share your value proposition, customer success scenarios, ideas you've developed or important info you're bringing.

B. Transition to questions – What will you say to transition?



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C. Focus on business issues (35-40 min.) List your Top 10 questions below.

-
-
-
-
-
-
-
-
-
-



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III. Advance the Process (5 - 10 min.)

A. Summarize your understanding

B. Suggest the logical next step



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About Jill Konrath

Jill Konrath is an internationally recognized author and sales strategist in the highly competitive business-to-business market. She's a popular speaker at annual sales meetings, kickoff events and professional conferences. Her focus? Helping sellers crack into corporate accounts, speed up their sales cycle and win more business. Jill's first book was the award-winning [*Selling to Big Companies*](#), a *Fortune* magazine "must read" and Amazon Top 25 Sales Book for over 4 years. Her second book, [*SNAP Selling*](#) (May 2010), shows sellers how to increase their effectiveness with today's crazy-busy buyers.

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