

Management of Field Sales
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Lecture – 09
From Prospecting to Preparing the Sales Call

Hello, I am Jayanta Chatterjee. We are discussing management of Field Sales. In today's session in continuation of what I was discussing in the last session; in the last session, we discussed about the first two steps in the personal selling process that is the identification of an opportunity as prospecting and the process of taking the prospect forward. So, creation of the prospect database and qualifying of the prospect database and a taking actionable points out of the prospect database, these are the kinds of stuff that we discussed in the last session.

Today I am going to discuss that having got the input from the prospect database, what do you do when you actually make a sales call that is what we are discussing. So, we will also therefore discuss a little bit the preliminary part of the sales presentation that means, the actual interaction with the prospective customer.

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**Strategic Customer Sales Planning—The
Pre Sales approach**

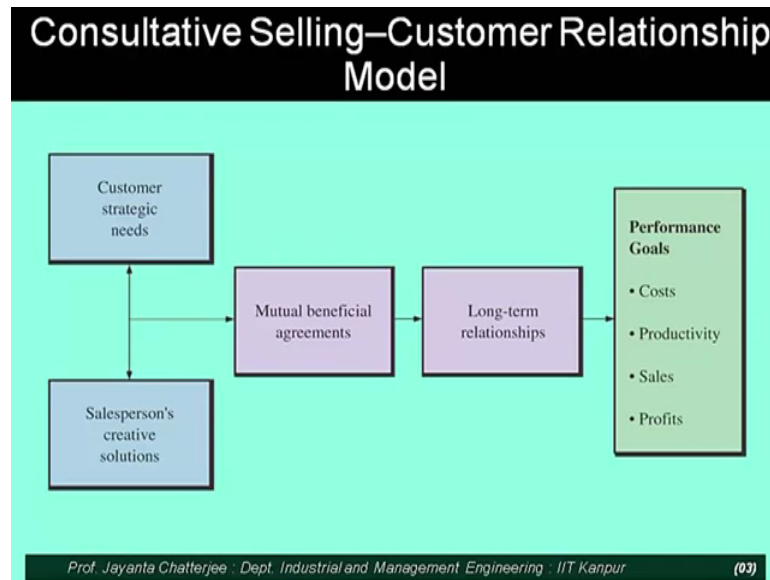
- Strategic problem solving involves
 - Strategic needs
 - Creative solutions
 - Mutually beneficial agreements

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So, the title is from prospecting to the prepared sales call. So, here is little bit highlight is that the element of strategy the element of looking at the bigger canvas. Understanding the customer's needs not from only the expressed viewpoints, but also understand it in

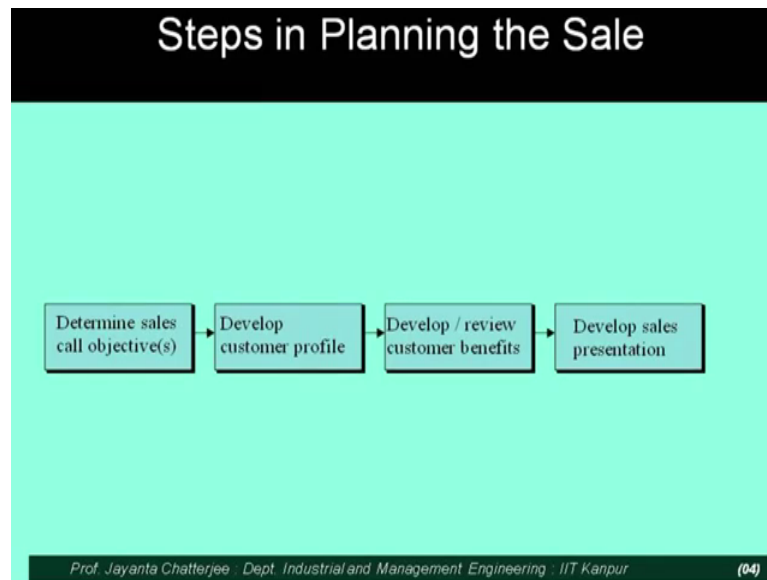
the context of customers own success requirements. So, the strategic needs of the customer. And coming up with a creative solution and mutually beneficial agreement; we will discuss this mutual benefit aspect a little bit more later on.

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If I put it in a diagrammatic form, this is a diagrammatic model of the consultative selling based on the customer relationship approach. So, the left hand side you have this customer strategic needs and the creative solution. These are the inputs. And from there you lead to the mutual beneficial agreement, develop the long term relationship. And the performance goals, this is the sales performance goals. So, obviously, you need to keep your costs down, improve your productivity, increase your sales, increase your profits. These are your goals sales performance goals. But do not put the goal first, but rather what I am saying again and again is emphasize the process; if your process is virtuous, then the goals will be attend better.

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This is what the cranks of today's session which is the steps in planning the sale and executing the sale. So, every call that you make out after the prospect database is given you an input and your sales dashboard is saying that this is the customer to call on today, then every case be clear about your sales objective. What is it that you are wanting to achieve in this particular call, that means, every call must have very crisply defined one, two or three objectives.

Not broad objective like I want to book the order, but an objective is that in today's session today's interaction with the customer, what are the objections I am going to take care of, what are the problems that had been identified, I am going to address in the interaction. Obviously, that will come from understanding of the customer profile. So, determine sales call objectives by understanding the customer profile and identifying the key benefits the customer is looking for. This is also earlier we have discussed as the developing the strategic value proposition that should be the foundation of your sales presentation.

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Strategic Customer Sales Planning—the Preapproach, cont...

- Always Have a Sales Call Objective
 - The precall objective – have one or more!
 - Focus and flexibility
 - Customer focus your efforts on the objective when you are with the customer
 - Be prepared to switch to another objective if needed
 - Make the goal specific
 - Move customer conversation toward the objective
 - Set a SMART call objective

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So, again summarizing what I just now said that always have a very clear cut sales call objective and should be not too many. And there should be some focus and flexibility. Both are important, that means, you have some objectives of that sales call. Now, the customer may come up with a complete new setup requirement. So, you should not, you should be flexible enough and not get hung up, no, these are the points I want to mention today and not be enough attention to customers points. Obviously, you should be flexible to give priority to what the customer is talking about and that should guide your interaction and the presentation.

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Strategic Customer Sales Planning - The Preapproach, cont...

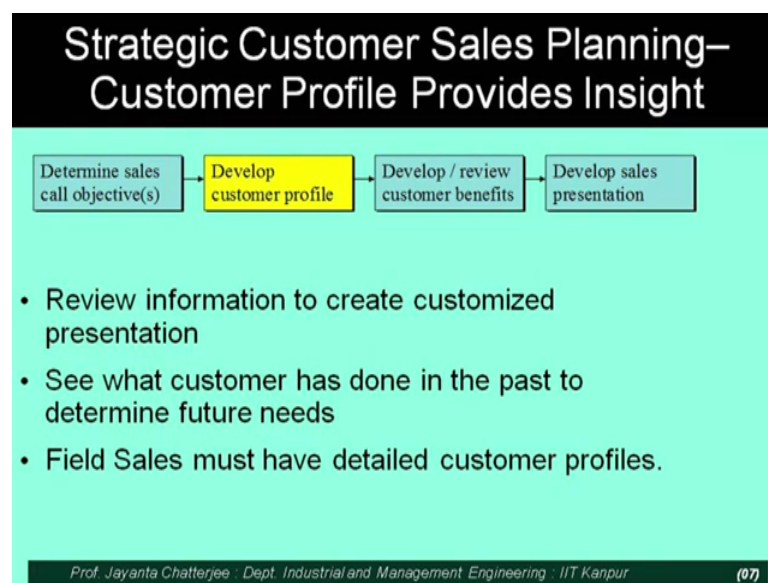
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graph LR; A[Determine sales call objective(s)] --> B[Develop customer profile]; B --> C[Develop / review customer benefits]; C --> D[Develop sales presentation];
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- Always have a sales call objective
- Set a **SMART** call objective
 - Specific
 - Measurable
 - Achievable
 - Realistic
 - Times

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And there is an acronym given here is that set a SMART call objective. It is an acronym, because it basically talks about Specific, Measurable, Achievable, Realistic, Times. So, it is really common sense just putting an acronym format, so that you remember that your in the sales pre approach, this your sales call must have some specific objectives. You should be able to measure at the end of the call to what extent your objectives were met, a specific objectives we were met. And obviously, you have to set such objectives which are achievable in that particular call depending on the position of the sale cycle where you are and so on realistic and etcetera. So, this is the objective setting.

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Then comes customer profiling. Customer profiling is what actually the objective and the customer profile. The customer profile is like a filter. You may have a 5 objectives, but you can prioritize to may be 3 by looking into again your customer profile. Customer profile is something that is a refined after every call. So, normally we keep a call report. In the call report, your aim should be to get more and more and more pertinent information into your customer profile, so that becomes you know better and better shaped.

Now, because if you do your customer profiling well, that means, not only the information the demographic type of information about the customer, but also detailed identification of the customer's needs, customer's problems, customer's current pains that will improve. This point we have discussed earlier that our whole aim is to look at

problem solving approach to field sales; develop the field sales personality as that of a consultant that of an expert who the customer will trust to provide the most appropriate solution.

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Information Used in a Profile and for Planning

Customer Profile and Planning Sheet

- Name: _____
Address: _____
- Type of business: _____
Name of buyer: _____
- People who influence buying decision or aid in using or selling out product: _____
- Buying hours and best time to see buyer: _____
- Receptionist's name: _____
- Buyer's profile: _____
- Buyers' personality style: _____
- Sales call objectives: _____
- What are customer's important buying needs: _____
- Sales Presentation: _____
 - Sales approach: _____
 - Features, advantages, benefits to customer's needs: _____
 - Method of demonstrating FAB: _____
 - How to relate benefits to customer's needs: _____
 - Trial close to use: _____
 - Anticipated objections: _____
 - Trial close to use: _____
 - How to close this customer: _____
 - Hard or soft close: _____
- Sales made – product use/promotional plan agreed on: _____
- Post – sales call comments (reason did/did not buy, what do you do on next call): _____

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So, obviously once you have that information then you will be able to focus on what benefits, what problem solving opportunities you are going to bring to the table and that will make your sales presentation much more effective and not blah blah about you know our product can do this, our service can do this. So, do not focus on the bells and whistles of your product or service of feature only, but rather use the feature information to highlight the advantages and benefits for the customer we call it FAB. I will just talk about the FAB just now, but at this slide I am talking about a typical customer profile and planning sheet structure.

So, as you see here the kind of information you will have will be name, address, type of business, name of buyer and now this you may have to depending on the complexity and the volume. You may have to generate this sheet for every buyer in the decision making unit in case of b to b. In case of b to c, for a consumer durable like for a car or refrigerator or for a high big size LED TV you may actually have one or two key buyer information here.

And then people who will influence the buying decision, so it can be you know in case of a large TV the sale value may be few lakhs of rupees, and the it may actually have a big

influence from the children of the family or from the older members of the family, it is a senior citizens in the family, who will spend more time with the TV.

And then of course, it should have some nitty-gritty information, like the buying hours and the best time to see the buyer, the receptionists name and all that. You know sometimes a good relation with the receptionist in a large organization or the secretary of a key decision maker can vastly improve access and your relationship.

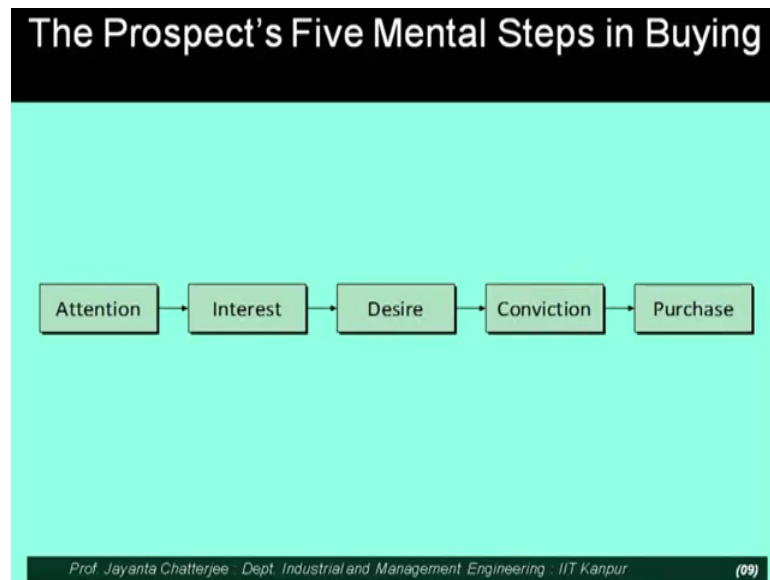
So, note and you can see here that you will not have all these information which are now on this projection, go through them and you will see that many of these you will have to collect over time through a few calls, through few meetings. And but you have to be active to know that I have these information and these information are lacking.

So, I you see here features, advantages, and benefits. This is the so called FAB, very very important in the sales process at this stage; that means, your product features or your service features are less important in the presentation compared to what advantages and benefits they can offer to the customer. So, do not talk about the speed of machining, but talk about the time that can be saved in the customers manufacturing process and the higher yields and lesser rejections or the optimization of the product customer's product output. So, your product features need to be brought out.

You need to subtly position your product as a superior option compared to your competitors, but do not take the tag of saying see my products can do these things and these x, y, z other competitors they cannot do these things that approach is not a very good approach. A much better approach is that your current process can be improved, your current manufacturing can be aided, if we offer these kinds of resolutions.

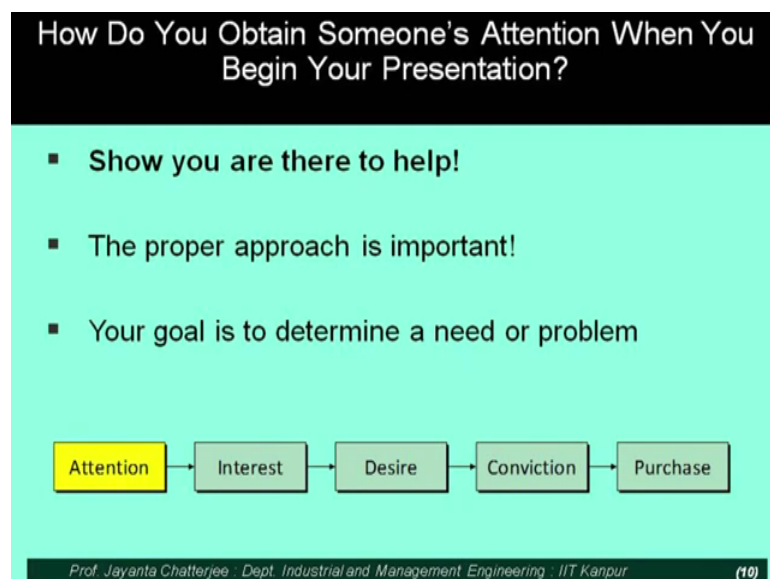
So, of you are offering advantages and benefits, and then you are pointing out that these advantages are benefits can be very gainfully obtained from the features of our products this feature, this feature, this feature. So, the feature listing should come later after pointing out the advantages and benefits which are primary for the customers need, and then accordingly you will be able to make your presentation superior.

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Because your purpose is on the left hand side the first two blocks to get attention and create interest; to get attention and create interest just like in a person to person interaction, even in a social relationship, you can get attention and interest much better if you focus on the other person rather than on yourself. You can very seldom get interest if you brag about yourself, and you are not listening carefully, and you are not highlighting the situation in terms of the recipients profile.

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So, for attention and interest, better attention and interest getting, you have to understand that show you are there to help. This approach is very, very important that your goal is to determine the need problem of the customer, and according the highlight the solution that you can offer, because that will actually interest.

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How Do You Keep Someone's Interest in What You are Presenting?

- Show you are there to help!
- Quickly present Feature and Benefits:
 - Fulfill a need
 - Solve a problem
 - Show and tell as discussed

Attention → Interest → Desire → Conviction → Purchase



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So, attention getting is by focusing on customer's problems. Not in a very gross manner, but in a subtle manner and not in an offensive manner, but in a more consultant manner point out the problems and that will allow you to go to the next step of generating interest. Because, then you can actually offer the features and benefits that you have. So, problem discussion problem identification, problem discussion leading to features and benefits that will fulfill a need solve a problem and that will actually then beat to the next stage which is the customer desire to acquire your product or your solution.

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How Do You Build Desire for Your Product?

- Show you are there to help!
- Using your trial closes, determine if prospect is interested in benefits
- Watch for nonverbal signals!
 - Green
 - Yellow
 - Red



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The conviction and the purchase are the final stages, obviously,, but as your going through this desire face, we very careful about the non-verbal signals. Like if the if the non verbal signals are showing the customers body language is showing interest, intent, the customer is looking at you and not you know looking away, not yawning, not calling for the other person, not getting busy with the on the cell phone.

If you have the attention and if you are continuing to engage, and this every sales person can feel that I have the customer's attention. And I am going to and you are getting more and more reception, then you have a go signal, then you have a green signal. You should be able to identify also therefore, the green and the yellow and the red. So, if it is red, that means this is not the right time to babble, this is not the right time to keep on talking.

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How Do You Establish The Conviction Your Product Will Solve Needs or Problems?

- Show you are there to help!
- Let the customer see how your product's FABs will solve her needs or problems
- Your trial closes will reveal whether the customer ready to buy

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graph LR; A[Attention] --> B[Interest]; B --> C[Desire]; C --> D[Conviction]; D --> E[Purchase]; style D fill:#ffff00
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Try to switch, try to get back to the interest level, then only you can go to the next step of conviction and purchase. At this conviction stage, obviously you are still you have to still strongly project that you are there to help. And you are also at this stage, you should be able to bring out that how the features advantages and benefits of your product will solve the needs and the problems.

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How Do You Know if Customer Ready to Purchase So You Can Close?

- Show you are there to help!
- Trial close response(s) give nonverbal signals that indicate positive beliefs that the product will fulfill needs or solve problems

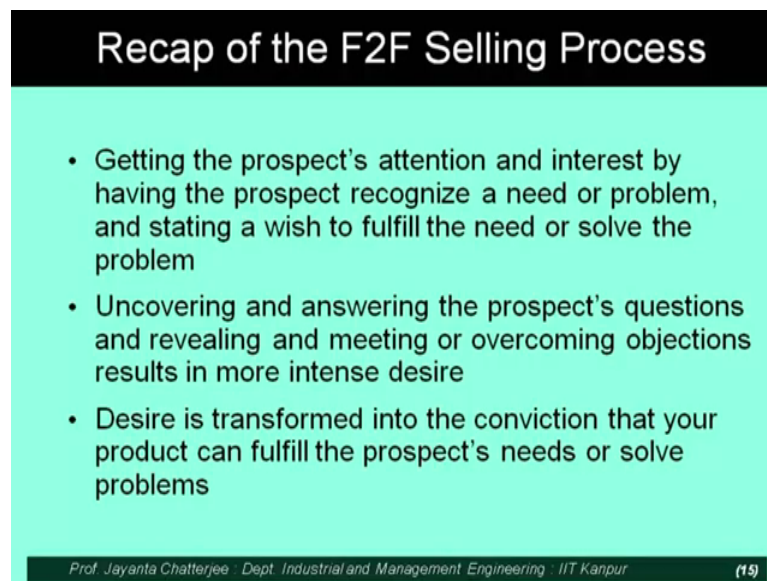
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graph LR; A[Attention] --> B[Interest]; B --> C[Desire]; C --> D[Conviction]; D --> E[Purchase]; style E fill:#ffff00
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And this is a stage where often a trial close that means almost a commitment can be obtained not always, but many times a at least a tentative commitment can be obtained.

And this is what we call strike the iron when it is hot; that means, never give up the opportunity of trying to close when you have the customer's desire and almost possible intend to get convinced by your features, advantages or other advantages and benefits offered by your features. So, at that stage you might actually say, so should we go ahead and then you know sign an agreement or close this deal and that in short is a is a concluding part to the first four steps of the selling process, or for first five steps.

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Recap of the F2F Selling Process

- Getting the prospect's attention and interest by having the prospect recognize a need or problem, and stating 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

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And the recap of the face to face selling process or personal selling process or field sales process is summarized here in three bullets. Get the prospects attention and interest by focusing on the need and the problem of the customer. And then uncovering and answering the prospect's questions and revealing how your features can offer advantages and benefits will result in interest converted into a desire. And a desire is transformed into conviction is again through a process which has to be very tenderly handle. And perhaps you if you go back to an earlier discussion about the buyer behaviour and buyer psychology then you will get some more inputs for this part that how do you actually convert a desire into a conviction and final purchase.

If possible I will have some more discussion on this at a later stage when we are discussing about the nitty-gritty's of the sales presentation. But as you can see here we have now created a canvas a framework how to structure the sales presentation or the

process of converting a desire into conviction and purchase so that is where we will end this section.

Thank you.