# ARE YOU READY TO SELL?

## Tips for "Before the Sales Call"

By Shannon Cox

Sales is all about relationships and helping others to solve problems, make improvements, or to simply be better.

To do that, you need to be ready for every customer conversation. Here are a few tips to get you ready for that important first contact.

In this article, we are going to focus on the first point in the Checklist, preparing for that first sales call with a new customer. Access the complete checklist here [link to checklist].

Before the Sales Call (or Visit) you can be prepared by:

- researching the company prior to the call
- learning something about the contact person and their business before the meeting
- preparing 3 points about the benefits of your service/product for this customer
- identify what you want to achieve from the call (e.g., what you need to find out from the contact person to be able to build rapport to start the relationship)

### RESEARCH THE COMPANY PRIOR TO THE CALL

Researching the company before the sales call has two perspectives: external to the company and internal to the organization. Assuming this sales call is with a new customer, the exter-nal research starts with a scan of the industry and the main sources of competition. You can use a SWOT analysis looking externally first for opportunities, and then assessing market threats. Depending on the type of industry and how familiar you are with it will determine how much depth in scanning you need. Generally older industries such as furniture making or a similar manufacturing industry are not subject to a lot of disruptive innovation: the players are established with few startups entering the industry, and most of the change is based on seasonal and fashion trends. Contrast that with the mobile phone industry which is experienc-ing rapid and disruptive change, and more in-depth industry scanning is recommended there.

Scan the industry, identify the competition and figure out where your customer's company sits compared to that competition. How do they stack up? Their position among the competi-tion will help you consider how to sell to your customer. Using the information from this analysis, consider if your customer's company wants to step into a lead role among their competitors? Copy them? Then ask yourself, how might your product or service help the cus-tomer compete better or become the leader?

Can this new customer use your product or service to be different from the industry leader? Are they focusing on a certain type of customer group or niche market? Michael Porter, an expert in business strategy and competitive strategy, identified generic positioning strategies companies can have. It starts with cost. Is your customer's company competing on cost (high or low)? Is differentiation/innovation their specialty? And is the focus the broad consumer market or specialized customer groups? (For a good overview of Michael Porter's concepts check out this MindTools link.) Looking at the competitive land-scape and understanding where your customer sits in their industry helps to identify the benefits your product or service po-tentially has for the customer. You won't have the full picture yet, but you will be able to speak with some level of understanding and formulate better questions during the sales call.

Now let's switch to the internal look at your custom-er's organization. This view frames the "fact finding mission" you are on during the sales call to identify the potential decision mak-ers. Going back to the SWOT analysis tool, what can you say about the strengths and weak-nesses of the company? Use their reputation to assess customer loyalty, look at geographic business area, and identify best-selling products. Review years in business to identify weak-nesses or problems in meeting demand, perhaps location? Who are all the people involved in the decision? Is your contact the decision maker? They are if they hold the purse-strings. Formally, all of the people who have a "say" are known as the buying group or buying centre. (For a sales perspective on identifying members of the buying group, see this Gallop article http://www.gallup.com/business-journal/179309/b2b-companies-know-customer.aspx )

Your contact is one member, who are the others? If you are selling cellphones, you are likely to seek out the business owner (small company) or purchasing agent (large organization) as they manage the buying process; however, they are not the only users, or might not be the final approval on the expenditure. You will want to think about visiting with some or all of the participants in the decision-making process in subsequent sales calls.

Yup. Subsequent.

There will be more than one sales call or visit because that is how relationships are started and nurtured. In his 2013 book, Contagious Selling, David A. Rich, uses the analogy of dating and marriage to talk about the process of building and nurturing the sales relationship. He emphasized the process and time needed to develop rapport and trust. He plainly states that proposing marriage on a first date is outrageous! Not enough information and time have been exchanged yet. As salespeople, we need to know more about our customer and their business problems, concerns, even dreams. No amount of pre-call research can provide all of that.

## LEARN SOMETHING ABOUT THE CONTACT PERSON AND THE BUSINESS BEFORE THE MEETING

What do you know about the person you will be calling on? And by this, we mean professional information. A quick search on Google and LinkedIn might pull up some useful information about their business community involvement or accomplishments. Caution: we don't mean "creep your customers". Look for information regarding tenure in the current company and previously held positions. You are seeking information that will "warm" up the sales call by having some small talk details to start the conversation with (besides weather and hockey - Canadian favourites!)

## 3 POINTS ABOUT THE BENEFITS OF YOUR SERVICE/PRODUCT FOR THIS CUSTOMER

Your sales toolkit is already full of examples and reasons why your product or service is terrif-ic. In planning for this specific sales call, think of examples that fit the situation that you think this customer is facing. As mentioned above, you have been doing your homework on the company and think you can help them remain and gain their competitive edge. Now is the time to sit down and think about how you can do this. And even write down the answers. This is the process suggested by motivation and sales expert, Daniel Pink in his book, To Sell is Human: the surprising truth about moving others. (See www.danielpink.com) He advises tap-ping into the motivations sales clients already have rather than persuading them to take what you have. For example, in consulting work there are many approaches we can use to diagnose and deliver business solutions, depending on what is the best for our client. When I work with an organization, I will share examples on how we customize background research and compet-itive analysis using this unique information to develop their unique business strategy and mar-keting tools. And if the client wants to delve into marketing tools to increase sales, then that is the conversation I get ready for with specific questions, examples and ideas prepared.

## IDENTIFY WHAT YOU WANT TO ACHIEVE FROM THE CALL

Business to business selling is a longer game than selling to consumers in a retail setting. The first call is likely to be the first of four to six sales calls you are going to make with this cus-tomer and their organization over the next year. So, not everything will happen in the first call. What is the most important? It could be as detailed as figuring out the Sales Cycle or buying timeframe information. Who else will be part of the decision-making process? More likely it is about getting to know their business successes and the challenges (or "pain points"). Being clear on the purpose of the sales call will smooth the flow of the conversation during the sales call itself. And we'll talk about that another blog (The Sales Call Checklist - Conversation During the Sales Call).

Mindtools has a great article on this: https://www.mindtools.com/pages/article/newSTR_82.htm