Sales Planning Checklist

- ☐ Gather information about the prospect AND the company background
- ☐ Research, so you know exactly what would be useful to your prospect
- ☐ Identify quickly all those that will be involved in the decision-making process.
- ☐ Have a valid, useful, helpful reason to visit the prospect

Before Interview with Prospect

- ☐ Look for additional information such as in trade magazine articles
- ☐ If the lead was from a referral source, ask them for more info about the "lead"
- ☐ Find other people who might know about the company
- ☐ Find industry contacts to give background information
- ☐ Always have a reference list including names and phone
- ☐ **"Role-play" the planned sales visit with another partner**
- ☐ Develop and give responses to objections – before they voice them.
- ☐ Make sure to get to meeting on time if you have an appointment

Interview with Prospect

- ☐ Address their "pains" right out of the gate (small talk is BS)
- ☐ List three things that differentiate you from your competition
- ☐ Make sure your presentation is unique and different from your competition
- ☐ Listen, listen, listen. Don't try to plan your responses while they are talking
- ☐ If they are the slightest bit hesitant, try to get them to say "NO"
- ☐ Once they say "NO," they will relax because they now feel "safe" from you
- ☐ You can then explore their objections and get them to tell you a lot more
- ☐ As they open up to you (after saying "no"), you will learn their real concerns
- ☐ Develop an "interview questionnaire" and ask them questions about themselves

NOTE: this checklist can be used in conjunction with one titled **Client Data Checklist** or you could use them independently