

Pre-Call Planning – The Key to Closing More Sales!

By Barbara Sanfilippo, CSP, CPAE

ROMANO & SANFILIPPO LLC

1 877-I SUCCEED

Sales Representative / Officer: _____

Prospect/Customer: _____

Phone Number: (_____) _____ Email: _____

☐ Objectives of the Call

☐ What do you know about this customer/prospect or their business? What client intelligence or documents can you gather prior to the call?

☐ Current services utilized

☐ Potential Needs/Cross-Sell opportunities and benefits to the customer.
Prepare to discuss at least three services – think big and expand the relationship!

Product/Need

Benefit

☐ **Key Open Probing Questions (How, what, tell me)**

Strategic Questions: (Determine the “pain” or “dreams” of your customers.)

- What are the greatest challenges you face in _____? (Attracting customers, growing your business, motivating your salespeople?)
- What is important about _____?
- What has been your experience with _____?
- What do you expect from a partnership with us?
- Other:

☐ **Competitive Information**

☐ **Potential Objections or Obstacles**

☐ **Key Players/Experts Needed on Call**

☐ **Role of each Player/Expert, if joint call with your manager:**

- Who will open the call?
- Who will probe for needs?
- Who will handle objections about _____?
- Who will handle price questions?
- Who will close and when?

☐ **List client decision makers, influencers and all attendees.**

(Are there any “advocates” or “resistors” you can talk to in advance of your call?)

☐ Check one day prior to your call to confirm your meeting and ask if there are any changes in the attendees or meeting length.

☐ Sales Call Agenda/Format

☐ Brochures/Testimonials/Presentation Materials Needed

☐ Closing Strategy/Ask For Commitment

☐ Sense of Urgency/Need (1-5)

☐ Allotted time for call _____

To inquire about Barbara’s speaking availability, sales training,
private phone coaching, or to order the CD of this call, email
Barb@RomanoSanfilippo.com
or call 1-800-I SUCCEED.

FAX BACK FORM Teleseminar

Pre-Call Planning – The Key To Closing More Sales! October 22, 2003

To: **Barbara Sanfilippo**
Fax: (760) 738-8900

Email: **Barb@RomanoSanfilippo.com**
Phone: (760) 738-9100

- ☐ I would like information on Barbara's coaching services by telephone to improve sales and service management skills.
- ☐ I would like information on having Barbara conduct a private teleseminar for my company.

SALES, SERVICE AND MOTIVATIONAL RESOURCES

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- | | |
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