CHIEF SALES OFFICER CHECKLIST

To increase your effectiveness as a CSO, use the questions below to better prepare for calls, deliver better presentations in front of customers and to critique calls. Continuous quality improvement results from planning and reviewing our performance. These questions should be considered by everyone making customer contacts in person or through any type of media. From the list below, choose all that apply.

Pre-Call Planning

- ❑ Where are we positioned in this account?
  - Who is our current contact in the client's organization?
  - What is their level of authority?
  - What is their primary buying criteria?
- ❑ Where else should we be positioned?
  - Who else benefits from our product/service?
  - Who else has a better understanding of the client's problems (not symptoms)?
  - Who could appreciate the difference in cost and price?
  - Who else can give us the information we need to develop a qualified and quantified cost justification?
- ❑ How are we positioned?
  - Are we sole provider? Should we be?
  - What is our plan to increase the share of business we earn from this account?
- ❑ What questions will we ask?
  - What do we need to know?
  - What questioning process or strategy will bring us that information?
  - What will our opening question be?
- ❑ What differentiation is most important to this customer? How do we know?
  - How will that differentiation set us apart from our competitor?
  - How will we calculate the value/benefit in terms that are meaningful to the customer?
- ❑ What problems will we solve for this customer?
  - What is the true cost of these problems? How do we know?
  - Where else do these problems manifest?
  - What other problems can we solve? Who else has problems we can address?
- ❑ What have we done to help the customer?
  - Do they know?
  - Have we quantified it?

Call Execution

Use the P.L.U.S.H. sales process methodology to execute the call. Have the word "PLUSH" visible and check off each area once it is thoroughly addressed. Stay with each element until you are sure you have explored all aspects of area of sales.

Post Call Critique

After the call, perform a post-call critique. Of course you will want to critique calls when a significant sale was lost. Also consider critiquing successful calls to make sure you know what you are doing right. All participants in the call should be a part of this critique and should feel free to openly express their viewpoint of the call. Every sales call is an audition for the next one. Nor sales calls are perfect – the next call needs to be better.

- ❑ Were we positioned with the right person?
  - If not, who should we be talking to?
  - If so, who else could we be talking to?
  - Have we saturated this account or only penetrated it?
- ❑ What did we learn?
  - The more we learned, the less we must have talked.
  - What additional questions could we have asked?
  - What additional information could we have gathered that could have improved our ability to qualify and quantify our value to our customer?
- ❑ What criteria is the customer using to select a vendor?
  - What differentiation is most important to them?
  - What do they believe that differentiation is worth to them?
  - Are they correct?
- ❑ What problems did we identify?
  - Did we cut through symptoms to find the real problems?
  - Were we able to qualify the different ways the problem impacts the customer's business?
  - Were we able to quantify the value of our solution in terms that are meaningful to this specific customer?
  - What additional problems might we be able to address in the future?
  - How will our solution differ from our competitor's?
- ❑ What extra-mile things will we do for this customer?

For more information, go to www.SaleSSuiteS.com or contact:

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