

# Welcome to Insight into Selling

Thank you for choosing the “Insight into Selling” Open Learning course of the Insight Marketing Series.

## Course aims

This course has been written to help you understand how the process of selling works, and breaks down the steps you need to take for consistent successful sales. It provides you with a logical structure, guidelines, tips and practical exercises to help you develop and refresh your skills.

If you're new to the subject and want to find out how to become a professional in this industry, you'll find the contents of great value. For those already experienced in sales, this course will provide a valuable reminder and highlight techniques that you may not have used for a while.

## Learning method

We recommend that you first look at the contents, and browse through each section, to give you an overview of the material. While it's tempting to jump ahead, we recommend that you proceed step by step through the sequence of each unit.

Assessments: This course comprises of six units, each with a simple self-assessment activity. You can use these activities to test your own understanding of each section. If you're not sure, go back and look at the unit again. At the end of the course, there is a final exercise to help you summarize your learning, and develop your own action plan.

Learning Log: It's also worth keeping a Learning Log, [like a diary] to reflect on your own development, summarise what you have learned, highlight areas which you found interesting or challenging, and make notes about further actions planned, reading and research. In this Learning Log you can also make a note of your own personal objectives, so that you can check these as you go through the course to make sure that your objectives are being met.



**Exercises:** The exercises in this course are designed to help you:

- Understand and apply the information you have just read
- Reinforce the reading matter
- Summarise what you have learned in your own words

Course content:

The sales process – what is it and how it works

The FAB principle- identifying features, advantages and benefits

Telephone techniques to add to your success

Making the most of first impressions, on the phone or in person

Sales planning for continuous improvement

Where to look for profitable customers

Power listening and questioning skills

How to turn objections into buying signals

Key closing techniques

How to evaluate your own performance

The importance of aftercare



## Course structure and breakdown of topics

- Unit 1: What is selling?**  
The sales process  
How buyers think  
The sales structure  
Setting SMART objectives  
Selling with FAB
- Unit 2: Finding prospects**  
Who are they?  
Existing/lapsed  
How can I get more customers from networking?  
Gathering marketing information  
Pursuing sales opportunities
- Unit 3: Arranging and managing the first meeting**  
Making a positive first impression  
Cold calling  
Getting past the gatekeeper  
Establishing customer needs  
Listening skills
- Unit 4: Interpersonal skills**  
Preparation pays  
Understanding the Customer  
Non verbal communication  
Using positive language  
Questioning and listening
- Unit 5: Developing the sale**  
AIDA  
USPs  
Handling objections  
Negotiation  
Closing the sale
- Unit 6: Sales management**  
Forecasting and monitoring  
Goal setting  
Evaluating your sales performance  
Positive thinking pays  
Customer Care



## Time guidelines

Experience has shown that this course will take about 15-20 hours to complete, depending on your existing knowledge. Your main objective should be to understand and be able to apply the course in your working life. I suggest that you do not spend more than 2 hours a day studying.

Here are some estimated times for completing each unit:

Unit 1	Two hours 45 min
Unit 2	Two hours 20 min
Unit 3	One hour 50 min
Unit 4	Two hours 50 min
Unit 5	Two hours 15 min
Unit 6	One hour 45 min



## Unit 1      What is Selling?

*“God is on the side not of the heavy battalions, but of the best shots”*

Voltaire

If you are planning to be a sales consultant, or are improving your skills by following this course, take a minute to write down here your own definition of selling.

Selling is .....

Whenever a person persuades another person to exchange goods, services, ideas, or information, for a financial or other reward, that is selling.

Because selling is something that a lot of people learn as they go along, it is very often an undervalued skill. This is particularly so in small to medium sized businesses, where the majority of the time and effort is spent on making the product or delivering the service, and that's hard enough without then having to go and sell it as well.

A lot of people also think that if they make or deliver a good service or product, then the world will beat a path to their door. Unfortunately it's not like that, and there's not even a magic pill which you can give people to make them better sales people.

The secret of selling comes down to understanding your customers, building trust, and paying attention to the details.

### The sales process

In order to fully understand how you should operate as a sales consultant, you need to understand the sales process from both the buyer's point of view, and the seller's. This applies whether you are selling to a consumer, for his/her own use, or to a business.

Business buyers are people too, and have all the variations of humankind. There are several important steps which they take in making a purchasing decision.



## Question 1

What do you think those steps are?

Please think about this for a minute, then write your answers here:

### The buyer's purchasing process:

- 1) "I need." The customer decides he/she needs to buy something. While some sales people can open up a need, the majority react to a buyer having recognised the requirement.
- 2) "It has to do x." Whether the intended purchase is personal or for business, there will be an element of function. It may be a practical solution, e.g. a software package that will analyse my accounts and do my VAT, or an emotional need, such as "I want to show how successful I am by driving a smart product/service". The buyer then starts to think about features and specifications.
- 3) "Who can help?" At this stage in the sales process, the buyer reviews his contacts, either formally or informally, asks friends or colleagues for recommendations, or, if you are very fortunate, you can introduce yourself to the buyer as a solver of his problem, at just the right time.
- 4) "What can you do for me?" The buyer wants to know if you can supply his perceived need, solve his problem, meet his specification. Professional buyers are tasked with finding "the right solution, for the right price, in the right place, at the right time". You are likely to be compared with other suppliers at this time, so you need to work hard to identify specific needs, which will leave you clearly ahead of the rest.
- 5) "That's what I need!" Good sales consultants help the customer to buy, rather than aggressively selling things the customer doesn't really want. So when your customer has made his/her decision, it is because you have presented your case effectively. This is the stage where you sign an agreement, shake hands, or exchange the money for the goods.
- 6) "I'll put your details on file." Follow-up is essential if you want to sell to this customer again, or get him to recommend you to his peer group.



## The sales structure

- 1) Plan and prepare. Without careful planning, you will be wasting a lot of your time and effort.
- 2) Prospect. You should always be looking for new leads. This can be a problem for many small businesses- they get a big contract, and are so busy dealing with that, they neglect to top up the lead bank.
- 3) Understand your customers. The more you can think like them, understand their reasons for buying, and which part of the process they are at, the more able you are to win the sale at the right time.
- 4) Present benefits/solutions. Customers are only interested in what you can do for them, so focus on how your product/service can solve their perceived problem, or add value to what they are doing.
- 5) Deal with objections, and turn them into buying signals. If the customer is bothering to ask you any questions, it can be an indication of interest. Use this to your advantage.
- 6) Close every sale. By asking for the order, sometimes several times during a meeting, you can achieve your objective. The customer will not necessarily buy unless you create the platform to do so by asking for the order.
- 7) Follow-up. If you want more business out of this customer, be sure to follow-up to confirm his/her satisfaction with the deal.
- 8) Build in positive customer care- you want the customer to put you at the top of his list next time he goes out to buy. A positive customer experience can reinforce your suitability for the next deal.

## Objective setting

You need to understand what you want to achieve, where you want to get it, and how much time and resource you plan to put into getting the sales. Also, you will need to plan your own sales process, and consider how you are going to apply the sales process so that it works for you.

The following is a list of crucial stages in the planning process. As a sales consultant, you should always aim to support the production and implementation of the sales plan.



## BE SMART!

A sales plan must have quantifiable and clearly defined objectives. Many businesses use the SMART mnemonic- Specific, Measurable, Agreed, Realistic, Timely.

**S** Specific- not just increase sales, or sell software packages, but actual values

**M** Measurable – indicate value and profit anticipated

**A** Agreed – agree with your boss, your client, your bank, or your business adviser what you think you can do – it will act as an incentive for you

**R** Realistic – if it is too easy, you will become lazy, and if too hard you will be intimidated. Use your best judgement, based on capital, location, estimated market size, and amount of time you (and colleagues) can spend. Depending on the size of the organisation, there will be other things to do, so selling 14 hours a day, 7 days a week, will not leave you time to do your paperwork, book advertising, make phone calls, and think!

**T** Timely- Give yourself a timescale and work to it. Allow for a slow start and remember that some months are traditionally slow for different types of selling. December and August are quiet months for double-glazing and water butts, while these may be the perfect times for gifts and planned maintenance contracts.

For example, an objective could be:

“To sell 10 contract hire deals a month, increasing to 15 after 6 months, with an average value of £5000 and an average profit of £1000.”

### Exercise A

Time guide: 15 min.

Write your own SMART objectives here:

- 1.
- 2.
- 3.





A sales plan must include a practical action plan or plans for achieving the objectives.

All relevant people should be consulted, both in the construction and the implementation of the plan.

All sales targets should be agreed and be achievable, and have sufficient resources, for example number of salespeople, to achieve them.

Long-term objectives should be split into manageable goals, e.g. per week or number of units sold. Also, remember to devise a reward scheme for yourself!

Continually review actual performance against the plan and take action if necessary.

Understand your market needs. This is where market research comes in, which all companies should consider before investing time and money in selling to a new market or area, as well as before developing new services and products. You can do your own market research by planning a simple questionnaire, and phoning prospective customers.

Consider sales aids. Think about whether you need a brochure, a multi media slide presentation, a portable flipchart, presentation packs for the board, a demonstration model, or any other sales aids. Make sure you've tested them before the real thing, and be prepared for possible equipment failure with back up systems. Consider also the environment in which you may be giving your presentation.

Remember your appearance. First impressions do count and you only get one chance to make a good first impression. If you get off to a good start and you feel you've got off to a good start in terms of the appearance, everything else you do will be a lot easier.

Record and review previous contacts. Before visiting any customer, or prospect, check your records and think about what has been said before. Most people take at least 5 contacts to reach a buying decision, and if you don't refresh yourself on the history, you can end up at a disadvantage.

## **Understand your product/service**

If you don't understand your product/service you can't explain it readily to your potential customer. You also need to have an in depth knowledge of your own company, expressed as a series of benefits to the client.

## **Selling with FAB (Features, Advantages and Benefits)**

In order to sell effectively, you need to understand your product in terms of features- what it does, advantages, what it did better than before, or better than competitors, and benefits- what it does for the customer.

In particular this will help you to match features and benefits to customer needs. Here is an example for you to follow:



**Product: Executive style car.**

Feature	Advantages	Benefits
Power steering	Makes parking easier	You will get into those gaps you never thought possible
Automatic	Optimises fuel economy	Reduces stress in busy road conditions
6 speed gearbox	Greater control	Puts fun back into driving
Air conditioning	Steady, controllable temperature	You will feel more comfortable
ABS brakes	Shorter stopping distances	Extra safety margin
Heated front screen	Clears faster than a blower	Lets your feet remain warm!
Electric sunroof	One finger operation	Less moving about in your seat/improved safety

Now it's your turn. For the following exercise, you can choose a real product or service which you know you will be selling, or work with one of the examples here.

Example product: A designer hair dryer with lots of extras

Service: The tax service of a local accountancy firm

## Exercise B

Time guide: 25 min.

Write down the Features, Advantages and Benefits of your company's product/service

**Hint:** to find out if your selling statement is about features or benefits, just ask "so what?" after each one. You can also think about the customer saying, "what's in it for me?"

<u>Feature</u>	<u>Advantage</u>	<u>Benefit</u>
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____



If you chose the hair dryer, here are some points you might have covered:

<b>Features</b>	<b>Advantages</b>	<b>Benefits</b>
Latest designer colour	Looks smart	Increase pleasure in use
3 speed	More choice than before	More choice of styling
Specialist nozzle	Accuracy and precision	Can do the latest styles
Interference suppressor	Less disruption	Can be used while watching TV

The tax service might be:

Local company	Faster response	Saving of time
Specialist in tax	Knows the short cuts	Saves on fines & high fees
Regional rates	Accountant knows the area	Lower costs, higher service

As you can see, it is important to know your products/services really well, and to work out phrases in advance, which you will use later to help you sell. While most sales people are rarely lost for words, good sales people have planned and prepared the right words, which they then make seem spontaneous and effortless.



Well done, you can take a break now!

## Assessment to Unit 1

The purpose of this assessment is to check your understanding of the topics we have covered so far.

1. List the three key elements of successful selling:

- i)
- ii)
- iii)

2. Describe the sales process from the buyer's point of view:

3. What do we mean by SMART objectives?

1. Complete these sentences:

- a) "Most people take ..... contacts to reach a buying decision"
- b) "Long term objectives should be split into....."
- c) "Customers buy ....."
- d) To check if a statement is a benefit, think of the customer saying," ....  
....."



## Unit 2 Finding prospects

The world is full of prospects- and while that is encouraging, it can also lead to confusion if you are not focussed on who your best customers are.

### Exercise: A Who are our customers?

Time guide: 10 min.

With a particular product or service in mind, write down the potential customers you could have. Then think how each group would make up the total to find a profile of your customer base.

#### a) Business

#### Percentage of total

Large local companies  
Small/medium local companies  
National companies  
International companies  
Other traders  
Other organisations  
Local government  
Utilities  
Other (specify)

#### b) Consumer

Local residents  
National consumers  
Specialist interest groups  
Special age groups  
Specific income level groups  
Specific family size groups  
Other (specify)

Total

100%



## Exercise B

Time guide: 10 min.

If you had to start from scratch, where would you begin looking for prospects?

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.
- 8.

Maybe you would carry out some research by:

- Looking in directories, membership organisations or on line references
- Looking in newspapers/magazines, perhaps with job advertisements where the extra staff could use your product or service
- Contacting Chambers of Commerce, who will have information about businesses in your area
- Identifying local businesses who might need your product or service
- Checking the web for likely users (or groups of users) of your product or service e.g. coach businesses often look for destinations to attract customers for day trips, such as garden centres or places that have been featured in a TV programme
- Networking with local business groups
- Building a business relationship with other suppliers of related products/services through some marketing activities, for example, newsletters
- The telephone can be used for research (to establish who the decision-makers in companies are) and appointment making.



- Leafleting a local housing/industrial estate
- You could use the data you have collected from the telephone research to send out an introductory letter/email outlining your products and services;
- You could o conduct promotions and advertising which will attract people in to view your deals. Think about:
  - local newspapers
  - specialist magazines
  - local radio
  - sponsoring a local event, e.g. junior football matches (to reach the parents)
  - posters and signs-so that people can find your site
  - open evenings ideal if you have to demonstrate complex equipment
  - business product/services
  - networking

In most situations you will find that the 80/20 rule applies (Pareto's law). 80% of your business comes from 20% of your customers and possibly your volume/value ratios are similar. It therefore makes sense to concentrate on your most profitable customers, when allocating budgets.

## Existing/lapsed customers

"It costs five times as much to get a new customer as it does to keep one you already have"

The One-to-One Future, Don Pepper and Martha Rogers

It's easier to sell more to an existing customer than it is to look for a new one. People who have been your customers in the past may very well have good reasons for stopping doing business, the contract may have ended, the person changed, the budget is cut, or they may be looking for other products.

Keep in regular contact with people who bought one, two or three years ago - they will want to change their supplier eventually and you need to be there when they do.

This is called the buying cycle - people tend to buy on regular cycles, and you need to understand and anticipate when they are planning to buy next.

In addition, because they are existing customers you have the advantage of knowing much more about them, and in turn, they will be much more amenable to you because you have already established a relationship with them.

It is worth reviewing your lapsed customers periodically to see if they have new needs, which you may be able to meet with some of your new products.



**Location.** There is no point in driving 100 miles to see one customer, for one £20 order. Think about the location of your prospects, and maximise the opportunities in a particular geographic location. Try to book days in geographic areas, i.e. Monday: Swindon Tuesday: Basingstoke,

**Decision-makers.** Very often in business to business sales, the decision-maker is not one person, but several. Be aware of the needs that each part of the decision making process may have, e.g. financial versus strategic versus problem solving, and approach each prospect based on their particular viewpoint. It's also worth testing if your main contact is actually the decision-maker at all, because they may not have the power/budget to make the decision, although he/she may be a key influencer.

**Cluster principle.** When you have found a type of customer who has similar characteristics to other customers in your files, think about applying the cluster principle. For example if you regularly sell to nursing homes, look at other nursing homes in the area, and think about extending to private hospitals.

**Do it often.** Prospecting is hard work, and one of the things that many sales people put off. It requires a lot of discipline to generate new business all the time, and therefore some sort of consistent, regular schedule needs to be planned.

It's very often the case that in some businesses, where everybody is up against the clock, time spent doing the job for customer 'A' means time not spent looking for customers 'B' and 'C', which results in high peaks and troughs and limits business growth. Remember, whatever industry you are in, developing new sales is a numbers game and the more you put in the more you get out.

**Making networking work.** This is a very good technique, especially for service businesses. The more people you meet, and know about you, and who have a business card of yours, are likely to pass on the contact, or think about you when they next need your particular product or service. When going to any Chamber of Commerce lunches or seminars, plan your objectives, don't just talk to the people you already know, and make a point of trying to meet three new people at each event. Exchange cards, and discuss their business, then follow up if appropriate.

We all know networking works, but it can be a daunting prospect to go and talk to people you don't know. As more business is agreed as a result of personal contact, especially in the professions and services, social and influencing skills are becoming more important at all levels. Use the checklist below to ensure you are prepared to maximise your networking opportunities:





## Pre-networking check list

1. The objective is

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2. The delegates I will concentrate on are:

Name	Company	Key issues	Client/Prospect
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1.

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2.

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3.

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3. I will sit with 

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## The Location

1. I know:

- the layout of the room	<input type="checkbox"/>	- toilets	<input type="checkbox"/>
- lights	<input type="checkbox"/>	- telephones	<input type="checkbox"/>
- catering	<input type="checkbox"/>	- music	<input type="checkbox"/>
- seating	<input type="checkbox"/>	- greeting/registration	<input type="checkbox"/>
- smoking areas	<input type="checkbox"/>	- pens/pads	<input type="checkbox"/>
- late arrivals procedures	<input type="checkbox"/>		

2. Greeters know whom I want to meet ☐

3. Legible name badges have been prepared (and spares) ☐

## Personal

1. What are my objectives at this meeting?

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2. Appearance. What do I need to do to present a professional image?

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3. Have I enough business cards? ☐
4. Have I a notebook to write key information ☐
5. Am I up to date on industry news/gossip? ☐
6. Have I organised a buddy system and any signals I will use?  
(A “buddy” will help you break into groups, rescue you when stuck with a bore, help you move on to your next target, and lots more. Where possible, agree with someone else to act as your buddy for mutual benefit).

## Post networking checklist

- 1) Did I talk to each of my targets? YES/NO

	<u>Name</u>	<u>Company</u>	<u>Issues discussed</u>	<u>Follow-up action</u>
a).	_____			
b).	_____			
c).	_____			

- 2) Did I talk to any other prospects/clients? YES/NO

	<u>Name</u>	<u>Company</u>	<u>Issues discussed</u>	<u>Follow-up action</u>
a).	_____			
b).	_____			
c).	_____			

- 3) Rate yourself out of 10 in terms of achievement of your objectives: \_\_\_\_\_

- 4) My plan of action to follow up my targeted non-attendees is:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

- 5) I learned the following, which is circulated to my colleagues for interest:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_



- 6) At another networking meeting I would do the following differently:

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## Mailing lists/your database

These can be bought or rented from specialist companies (list brokers) who keep clean, up-to-date special interest or business type lists. For many companies these are a very effective way of identifying target prospects.

Keeping records. Whether you keep your records in a product/serviced index box, or on a high tech, sophisticated database system, make sure you do keep them. In either case, because you are keeping personal details, you must register with the Data Protection Registrar.

Information should be updated regularly, say, every 6-12 months, so that if a sales person leaves, somebody else can take over very quickly. It is essential to keep accurate and detailed records of all enquiries and sales.

Your database of customers and prospects will become one of your most important assets, so you as the Sales Consultant should ensure that:

- a) It is kept up to date
- b) Only authorised staff are allowed to access it

Also if you do not actually meet or talk to the customers as regularly as you would perhaps like, having the records to hand means that you can remind yourself about what you talked about previously, their particular interests, and their company needs.

Lateral thinking. It's worth occasionally spending half a day brainstorming potential new areas of business, using not only the sales team but also other key staff, as you may find many people in your company come across potential customers, perhaps through suppliers, or other organisations.

Make appointments. It is generally preferable to make appointments, rather than just pop into reception, (although in some industries this is acceptable).

Confirm meetings. Prospects appreciate the courtesy of a confirmation of the meeting, so that the appointment is formalised, and the prospect is thinking about how your product or service can meet their needs. Do not worry that people might cancel, if they do, it is better than wasting time on the day.



Don't give up! When making phone calls, most people in the UK give up after 2 or 3 attempts. In the US they do not believe that you should give up until 12 attempts. Depending on the industry, you can usually expect to make about 3 calls to generate one contact with the decision maker, and again depending on the industry and the effectiveness of your telesales, convert about one in five to an appointment. In this job you need a very thick skin, a good record system and self discipline not to be downhearted.

The key to successful prospecting is to get your sales leads from a range of different sources. Don't rely on just one – this may dry up one day!

## Contributing to marketing

As a salesperson you are ideally placed to act as an information gatherer. You are in the front line. Each day you will spend time talking to existing and potential customers, and you will therefore understand the prevailing market conditions, what and who you are competing against, what really interests your customers. You can collect information on:

- Competitors
- Customers
- Market conditions

Pass it on to whoever in your organisation is responsible for planning. It can then be used to prepare recommendations for improving sales plans, activities and performance.

### Exercise C

Time guide: 20 min.

Think of the information, which you are in a position to gather, which would be helpful to whoever is compiling the sales plan? Write down where you get it from, how often and whom you should pass it to?

#### Research Plan

What information

Where from

How often

Pass to



Here are some examples of useful planning information; you may have already listed some of them above.

Competitor information:	pricing strategy special offers/promotions advertising strategy
Customer information:	customer profile information feedback from customers on how product/services can be improved
Market conditions:	regional economic conditions may affect people's propensity to purchase deals, e.g. opening/closing of a major employer unstable interest rates may make fixed interest loans attractive
Product information	ranges, styles, extras, user reports, catalogues, price lists, and trade magazine write-ups.

Can you think of others? Write them in here, so that you can refer back to them later.

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## Marketing Planning

It is likely your Marketing Plan will be based around the Marketing Mix - often remembered as the 4 P's:

- **Product**, i.e. the goods and services you offer
- **Place**, i.e. your channel of distribution of your product or service to the customer
- **Promotion**, i.e. advertising, mailshots, web response
- **Price**, including special offers, payment terms methods of payment



Ensure you gather and pass on feedback about your own organisation's effectiveness in these areas. In addition, pass on information about how your competitors are performing in each of these areas. Examples of practical ways you can do this are:

- Ask your customers where they first heard of you, why they came in to see you - was it in response to an email/mailshot, did they see an advertisement, and if so which one? Make a note of the source on your enquiry software. This will help you identify the best promotional methods, and the least cost-effective.
- Keep a record of any special promotions which your competitors may be running; you might want to phone them up asking for further details.
- Keep up to date with trade magazines; what is 'hot' in the industry?
- Ask yourself whether the promotions your organisation is running are actually working; are they really meeting customer needs and wants? If not, then feed back your ideas about what may do the trick, to whoever is responsible.

## SWOT Analysis

### Exercise D

Time guide: 30 min.

Carry out a **SWOT analysis** for the Sales Organisation element of your organisation.

SWOT stands for Strengths, Weaknesses, Opportunities and Threats, and you should list what you think they are for the Sales part of your organisation.

Strengths and weaknesses are internal, and can include skills on the computer, experience in a particular trade, in-depth product knowledge, or lack of marketing.

Opportunities and threats are external, and should include growing residential/business area, changes in legislation, competitor closing down, large population of target group.

If you need more information about the make-up of the local population, contact your local Council, or Chamber of Commerce.



<b>Strengths</b>	<b>Weaknesses</b>
<b>Opportunities</b>	<b>Threats</b>

## Pursuing sales opportunities

Once you have identified your prospects/potential customers, you need to take action to pursue the opportunities. You should ensure that:

- Sales leads are dealt with promptly and efficiently
- Contact with customers is made at the appropriate time and using the appropriate method - face to face, phone, letter
- Customers should always be treated in a courteous, tactful and professional manner
- You are aware of the decision-makers and influencers - very often this group includes children, who may have a big part to play in the final decision, for example, with cars or houses, if they are present during the test drive
- You are able to talk knowledgeably about the deals and services you offer, and are able to convey this clearly and accurately to the customer, checking their understanding as you go
- If you have agreed to follow up on something after an initial meeting, ensure you do.

Even if the discussion leads to no sale, always ensure that you keep a note of the customer's details and the reason for not buying this time round; there could always be a next time.

Well done – you deserve a



break now!



## Assessment to Unit 2

Time guide: 45 min.

The purpose of this assessment is to help you apply the information in unit 2 to your own situation.

Please outline a plan of how you can generate sales leads. Include in the plan a quantifiable objective and an appropriate timescale for the different techniques used.

[illegible]



## Unit 3 Arranging and managing the first meeting

### First impressions

You should always present yourself as you would want to be greeted - remember first impressions are crucial. Some useful tips are:

- Smile and maintain eye contact - but make sure it is genuine and unobtrusive.

**Hot tip!** Look at the general area of the triangle formed by the customer's eyes and mouth. This maintains interest, without staring.

- Dress according to the environment you work in - a suit may be appropriate, or in more informal settings, a casual look is fine. However, the rule should be always smart and presentable.
- Keep a comb/brush and a clothes brush handy (for wet/windy days).
- Clean nails, clean, cool not clammy hands, and a firm but not overpowering handshake are essential.
- Be confident and sincere, not pushy and insincere.
- Smokers should carry mints, for fresh breath.
- Business cards should be clean, not bent, and have all current information. Give at least 2- they may pass the spare onto a colleague.
- Do voice exercises early in the morning, so that your voice sounds clear, confident, and warm. Lowering the pitch of your voice, and speaking more slowly, will help you to sound more authoritative and in control – try it!
- Always carry 2 pens, and a small notebook, even if you do it all on your I-Pad. You never know when you may want to write something down.
- Watch your body language. Adversaries line up directly opposite, to see the enemy more clearly, while nervous people invade the space of others. Folded arms is a defensive position, and hands in pockets can look as if you don't care.
- Consider your sales material. Do you have brochures, technical data sheets, case studies, newsletters, price lists, samples, a presentation folder, a laptop presentation, copies of your Report? Are they all clean, current, and relevant? Do you have a fallback if your technology doesn't work?



- Your vehicle. If you are parking your car in the company car park, think about any impression that will make, whether it is a rusty van, cheap but possibly not reliable, or a Porsche which is flash, successful, but possibly expensive. If it's littered with fast food wrappers, half your wardrobe, and hasn't seen a carwash in months, think about what impact you are making.

## Exercise A

Time guide: 5 min.

Prepare your own checklist for a good first impression, based on the points above. Keep it by your desk, in the product/service, and wherever you take a few seconds to think. Develop the habit of referring to it to check you are making the best first impression you can.

Before you go into your meeting think about your plan of action. You want to control the meeting from beginning to end, to the point where the prospect says, "Yes, I'll sign". This is reached by a carefully developed plan of action, which you then also have to be flexible enough to amend, depending on the feedback you get. Doing your homework and thinking about your plan of action before you go into the meeting, helps to generate a feeling of confidence and enables you to keep the meeting on the lines you want it to go along.

## Your impact on other staff

Other staff can be the gatekeepers, and you can get them on your side. So be nice to Rita in reception, be polite to Mrs. Dragon the secretary, and be courteous to Jim at the gatehouse. Make a note of their names, and be ready to greet them personally on your next visit. You do not know the internal politics of the company, and who feeds back what information to whom. When you go back again, having made a good impression on them, they will open doors more easily for you for the future.



## Telephone marketing

Planning and preparation are the keys to telemarketing success. While telemarketing shares some of the same techniques as other forms of selling or market research, there are specific skills, which can be applied in this environment.

**Hot tip!** Many telemarketing professionals prefer to do their calls standing up. This releases the diaphragm, allows more breath in the lungs, and gives greater control. Try it!

- Are your prompt notes/script to hand? Some people prefer working with a script/some don't - we'll talk about this later - but if you are working with a script make sure you have it to hand.
- The diary. If you are making appointments, you can't just hope you are going to be in Bradford a week on Tuesday –you will need your diary to make offers of dates to the person on the telephone
- The map. If you don't know the distance between Bradford and Birmingham, this is going to cause problems.
- Product information - if you need detailed product information, be sure you have it in an easy to use form- there is no point in having the company brochure, and wading through it every time, if you can summarise the key points on a sheet of paper.
- Is there anything else that you need - Customer Relationship Software familiarity?

When working on the phone, it is recommended that you clear your work surface of cups of coffee, do not eat apples, toffees, or other distractions to the customer.

## Personal Planning

Know what you are doing and why. If you do not concentrate while on the phone, it will be apparent to the person you are calling, and you will not be successful.

Set a personal target. You can expect to make 10-15 calls an hour, depending on the nature of calls. Set your hourly target. Break it down into small pieces making it much easier to start. Then work out how many calls you have to make to find out how many contacts you get. Then work out how many contacts you need to actually turn them into appointments or brochures to be sent out. This way you can keep an eye on how productive you are.

### Example

No. of calls per hour:  
No. of contacts per hour:  
No of sales/appointments:



For higher value items or services you should be aiming at these targets:

15 calls per hour = 5 contacts = at least 1 appointment/sale
--

## Who are you calling?

Know who you are calling before you pick up the phone. It is very easy to become distracted, but you can imagine a call where the person calling sounded vague-you would not treat it with any importance.

If the company has been in the news, check the facts, as that may influence your call.

If you have spoken to them before, check the name of the receptionist/secretary, - they will be pleased if you use it.

If they've got a difficult name check with the switchboard how it is pronounced/spelled, and if they are Mr/Mrs/Ms/Dr.

When did they last hear from you/your company? If ever?

## When is the right time?

Many businesses find the best times to be Tuesday and Wednesday. However, early on Monday morning is not always a good time to call because many people are involved in weekly meetings at this time. Friday is probably not the time to start opening new discussions - but unexpected times do sometimes work.

Lunchtimes can be good as bosses are out of meetings, secretaries are at lunch, and the contact may answer the phone him/herself.

Calling customers at home, especially if cold calling is more difficult to plan. It is recommended by voluntary regulators in this business sector that in the UK, you do not call after 8.30 p.m. in the evening and few people want to be interrupted during their meal times.



## Getting Through

**Sound confident.** - If you have checked your benefits and prepared your benefit statement, you will sound more confident in the product/service.

**Focus** - Forget about the shopping list, the product/service needing a service, or what is on TV tonight. If you do not sound 100% concentrated on the call, it will be detected in your voice and the potential customer will not listen. Result- wasted call, and possibly unhappy customer.

**Smile** as you connect. Practice your smile because it uses 15 calories a time, and you can hear a smile down the telephone. When you smile your voice automatically gains uplift, so focus on the customer by imagining a nice face to match their name. Think about meeting the person and how you would smile as you were introduced.

## Getting past the gatekeeper

For many sales people, this can be the hardest part of telemarketing. There are several techniques to deal with this issue- try them and see which works best for you.

1. Time your call carefully - it may be better to call around lunchtime, when the potential customer is answering his/her own phone
2. Use a referral. If you have spoken to someone else in the company, you could say that "Mr Smith in Personnel suggested I speak to Miss Jones personally"
3. Involve the gatekeeper. Often, if the gatekeeper is powerful, he/she may be able to support your case. E.g. "Can I give the information to you and you can advise me what would be of interest to Mr X?"
4. Get the gatekeeper on your side by thinking in terms of a benefit to her. For example "This call could save your company money", "I think Miss X will want to know about this special offer", or "Mr Y asked me to call him about this".
5. You could ask him/her to suggest a good time to call back.
6. If you get hung up in "voice mail jail", you could try leaving a message highlighting a benefit, and indicating urgency to achieve that benefit. For example, "This is Pete Smith calling from ABC computers. I'm phoning you to let you know about our special deals on top of the range laptops. We have only 20 to sell at the giveaway price of £200, including software and fast modem. Please call me if you would like to equip your sales team with state of the art communications and database management, to help them sell more. I can be reached on....."

You will not get past every gatekeeper, but these ideas should help you increase your contact rate. The important thing is to be polite, strong in the knowledge that what you are selling is of benefit to the customer, and persistent.



## Opening the call

“You only have 15 seconds to make a good first impression”

The first 15 seconds is your best opportunity to make a good first impression. That’s why it is essential to be very prepared and open positively. If you cannot interest the listener at the beginning of the call, it is going to be much harder to get him/her interested as the call develops.

Think positive. If you start each call thinking that the prospect really wants you to call, then you will sound much more positive than the grudging, “I don’t suppose you’d be interested in ....” Which do you think is the more successful?

Remember to speak slowly and clearly. If you gabble, the listener will soon lose patience.

When people pick up the phone, they need a few seconds to tune in to your voice. That is why it is good practice to always start with “Good morning,” or “Good afternoon”. This allows the listener to tune in, realise it is not a voice he/she recognises, and prepare to listen.

The first thing to do is announce yourself, let the listener know who you are right away, and give your name. If your name is complicated, use an abbreviation which sounds good on the phone. You may only want to use a first name, as the prospective customer is less likely to take in 2 names at this stage.

If you use his name 2 or 3 times within each call it reminds him that he is taking part in this conversation. For example, if you’ve quite a few sentences to say, intersperse some of the talking with questions - get him involved and use his name to further involve him.

Establish their needs at the earliest possible time. Get the respondent involved early in conversation by talking about what interests him and his business, his products and his problems. e.g. “do you use computers in your workplace, Mr Smith”; “do you feel that you are getting as much out of them as you possibly can”; do you think that if you knew a little bit more about some of the software functions, you could save yourself a lot of time”.

### Exercise B

Time guide: 5 min.

Prepare and write down an opening for your business, to include:

Name:

Company name:

Purpose of call:

First question to respondent:



Did you write something like this?

“Good morning, Mr Jones. My name is Susan and I’m calling from 2K computer services. The reason for my call today Mr Jones is to ask you if you need to save money on computer consumables?”

Now practice saying/reading it to another person. The more often you do it, the easier it will feel.

### **ACTION POINT:**

Save your opening on another piece of paper - this will form the start your own prompt notes.

## **Core dialogue**

Now that you have successfully opened the call, you need to establish the needs of the prospect, and match them to benefits of your product/service.

**Warning!** Poor sales people start with a long statement about themselves and their company. This is often an inflexible script, which turns people off.

It is important to get the prospect involved early in the call, by talking about what he/she is interested in, his business, his problems. For example, “ Do you use computers in your business, Mr Brown? Do you feel you are getting as much out of them as you can? Would you like to save time on some of the longer applications?”

The idea is to get him to say yes as much as possible during the early stages of the call. If you get the listener to say yes then they have got into the habit of agreeing with you, and will be more likely to agree with you when you offer the appointment.

## **Using open and closed questions**

Use open questions when you want to involve the listener in the dialogue, or when you want to find out more about their needs, or to match your benefits to their needs. You will learn more about Open and Closed questions in Unit 4.

Build a case for an appointment. Following the opening, you need a series of questions which will find out the customer’s needs.

You should be planning to spend 30% of your time talking, and the remaining 70% listening.

Buyers feel better about a sale, or an appointment, if they have identified their own needs. It is then up to you to provide the most appropriate benefit – which will meet that need.



## Make an offer

By using questioning, in the ways shown above, you can prepare to make them an offer, which is most relevant to their needs. Think carefully about these offers: here are some you can use:

- a) A free consultation
- b) A brochure containing valuable information
- c) Specific information which would be of value to their company but is only available from our highly trained consultant
- d) The fact that the appointment will only take half an hour
- e) A free analysis of their needs (sometimes called an audit)
- f) Copy of a report
- g) Discount if purchased within the next 7 days
- h) A free presentation

All offers should relate to those **benefit statements** you prepared earlier.

### Exercise C

Time guide: 3 min.

Can you think of an offer that you could make, on behalf of your company/client?

Write it in here:

---

---

---

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## Using the right language

On the phone you have none of the usual “clues” which are available for face-to face selling. You have to put everything into your tone of voice, and the words you use. That is why we encourage people to prepare the exact words and phrases, and practice them, so they sound natural.





## Listening

Really concentrate on what the speaker is saying. Take advantage of the information available to you, whether on a credit product/serviced (in a retail situation), at a restaurant booking, a computer screen, or a switchboard operator who asks for your name before trying to connect you.

## Buying signals

- The listener says “I am very busy right now” - what he’s really saying is he wants to talk to you but not right now; you reply “When would be a good time to contact you Mr Jones - Tuesday p.m. or Thursday am?”.
- “Well I’d need to talk to my colleagues”. That’s great, Mr Jones. I can send you some information to give to them which they will find helpful.”
- “We are going to review it all in 6 months anyway”. Say you’ll phone back in about 5 months to check if they need any help, and ask more open questions to check on their perceived needs, so that you can be ready - make a diary note.
- That sounds very complicated”. “It isn’t really, Mr Smith; we take away the hassle, and leave you free to concentrate on your business.”
- Using his knowledge to test yours-this does happen. Your reply would be “I’ve not had the full technical training Mr Smith but I know that our sales manager will be able to answer your questions. I can make an appointment for him to come and see you and you can ask him that/other technical questions which he is very well equipped to answer”.
- “Not interested in product X, but what else do you do?” This is a very good buying signal - they are trying to find out other information - you have already established a relationship with them and they now want to find out other information about what other products you have. The reply is “ We offer a tailored service. Can you tell me a bit about a particular application, then I can suggest our best product”. So you have now got a dialogue going.

Do not make false promises - if you need to ring back, make sure you do so at the time you said, even if you have not been able to sort out the problem.

Sometimes it is important to probe for hidden objections. These are where the customer is not telling you what his objection is, but you can tell there is something which is stopping him from booking the appointment/buying the product.

For example, you could say,

“In what circumstances do you think this product/service would be most useful to your company, Mr Brown?”



“I know you are concerned about delivery, can I take a minute to explain our new approach, which customers have found particularly useful?”

“If I can satisfy you on the qualifications of our engineers, then will you let our Technical Director visit you to discuss how we can help?”

And if you don’t know the answer, rephrase it and turn it back to him:-

“That’s a very good point, Mr Green. We are certainly going to have to satisfy your specific requirements on that point. Let me just check with our IT director, and I’ll call you back with an answer. How late will you be in the office today?”

Think of objections as someone saying, “I would be interested, if only.....” and prepare answers based on the possible if onlys.

Make sure that the customer is comparing like with like, when he says, “But I can get it down the road at 20% less”. In this situation, you must go through the product/service point by point, to check that they are comparable, and match his needs.

And finally, it is bad business, as well as bad manners, to directly knock the competition. You should know about the competition, and its products/service, and highlight where yours are better than theirs.

### Exercise D - Buying signals

Time guide: 20 min.

List here 5 buying signals you might hear on the phone, and how you would respond.

#### Signal

#### Response

1.

2.

3.

4.

5.



## The closing process

You decide when and why to close, but make sure these relate to the customer's needs, as well as yours.

Your goal is to get the customer to say:

“Yes, I'll see you”

“Yes, please send me details”

“Yes, I'll explain what I need you to put in your proposal”

“Yes, let's talk again in 3 months”

## Confirm the appointment

Here is a sample letter/email you could use to confirm the appointment- adapt it as you wish.

Dear (name)

Thank you for taking the time to talk to me today, when we discussed how ABC Telemarketing could help you win more customers, and grow your business.

As we agreed, I have arranged for our Senior Consultant, Sally White, to come to visit you in your Derby office on Thursday 23<sup>rd</sup> May at 2.30 p.m. I have enclosed/attached a copy of our brochure/ a magazine article which appeared in Quality News, which you may like to read.

If you have any questions in advance of the meeting, please call Sally personally on xxx xxxxxxxx .

Yours sincerely,

Now check your targets against what you've done. Have you made your calls/contacts? If not, perhaps you know why not. Look at each stage of the process, and consider what you could have done better.

## Stamina

Telemarketing is not for the faint-hearted. You might have made 100 calls today, and this is your 101st, may be tired/fed up/desperate for another cup of tea, but remember that you are making a first impression on the next person being called. You want them to be enthusiastic because you are enthusiastic.



## Exercise E

Time guide: 3 min.

Please write down the following steps in the correct order of the telemarketing process.

1. Building a case
2. Dealing with objections
3. Preparation
4. Opening
5. Establishing needs
6. Active closing
7. Listening for signals



Well done, you can take a break now!

### Exercise A - First impressions

Time guide: 10 min.

#### 1. Appearance.

Rate yourself out of 10 on each of the following. Be truthful (you may like to ask a friend to help)

- 1) How efficient do I look?  
\_\_\_\_\_
- 2) How friendly do I look?  
\_\_\_\_\_
- 3) How well groomed do I look?  
\_\_\_\_\_
- 4) How well do I make eye contact?  
\_\_\_\_\_
- 5) How often do I smile?  
\_\_\_\_\_
- 6) How often do I fidget when talking to customers?  
\_\_\_\_\_
- 7) How clearly do I speak?  
\_\_\_\_\_
- 8) How politely do I greet customers?  
\_\_\_\_\_
- 9) How well do I make eye contact?  
\_\_\_\_\_
- 10) How often do I thank the customer for the call/visit?  
\_\_\_\_\_

Score:	70-100	You're making an excellent first impression
	50- 69	Note the points where you scored less than 5 and work on improving them.
	Under 50	Make a detailed plan of what you will do to improve your first impression.

### Exercise B - Telephone techniques

Time guide: 5 min.

Prepare a Telephone Contact Report Form, to record:

No. of calls\_\_\_\_\_

No. of contacts\_\_\_\_\_

No of appointments\_\_\_\_\_

Other information\_\_\_\_\_



## Unit 4      Interpersonal skills

### Preparing for a sales meeting

It is always good practice to have some clear objectives every time you talk to a prospective customer. For example, this may be to ensure they have a favourable opinion of your business to business over those of your competitors, or it may be to agree a price that ensures a sale but gives you a healthy profit.

You may already have relevant information from previous sales calls - always be well briefed, perhaps from sales records you have kept. This will not only ensure that you do not look foolish because the customer is repeating information already conveyed, it may also help you to anticipate and successfully handle objections before they are raised.

### Effective Communications

Although you are a professional communicator, some reminders are always useful:

Verbal communication should be clear, accurate and at a pace which enables understanding. The tone and manner should be adjusted to the needs of the listener and situation and should be supported, not contradicted by appropriate body language.

Written communication should be clear, accurate and legible. It should contain the relevant information and be made in the appropriate style and format - making use of standard documents and forms wherever necessary.

You should be able to store and access information easily. If you use a computer system, are you competent in using it? If you use a paper-based system, why? Now is the time to get up to date and use the technology.

### Understanding the customer

As human beings, we are constantly forming a wide variety of judgements about other people. We do this in a number of ways - we infer from what we see and hear an opinion about a person, or sometimes we form an intuitive opinion about a person. Because we are all different, we form opinions and judgements based on our own individual experiences.

The first key to understanding our reactions to other people is to understand ourselves.

There are 4 broad types of personality- Analytical, Driver, Promoter, Supportive. By doing the next exercise, you can find out yours.



## Exercise A

Time guide: 20 min.

Mark the phrase, from each pair below, which would correctly complete the statement:  
“I WOULD SAY THAT I AM....”

Answer each one by ticking either column A or B and pick the phrase that applies to you over 50% of the time.

<b>A</b>		<b>B</b>	
More proactive	_____	More passive	_____
More risk orientated	_____	More conservative	_____
More intensive	_____	More relaxed	_____
More talkative	_____	More quiet	_____
More challenging	_____	More listening	_____
More opinionated	_____	More accepting	_____
More direct	_____	More following	_____
More bold	_____	More subtle	_____
More confronting	_____	More retiring	_____
More expressive	_____	More supporting	_____
<b>Total</b>	_____		

Total all the tick marks in Column A and put that score on the total line.

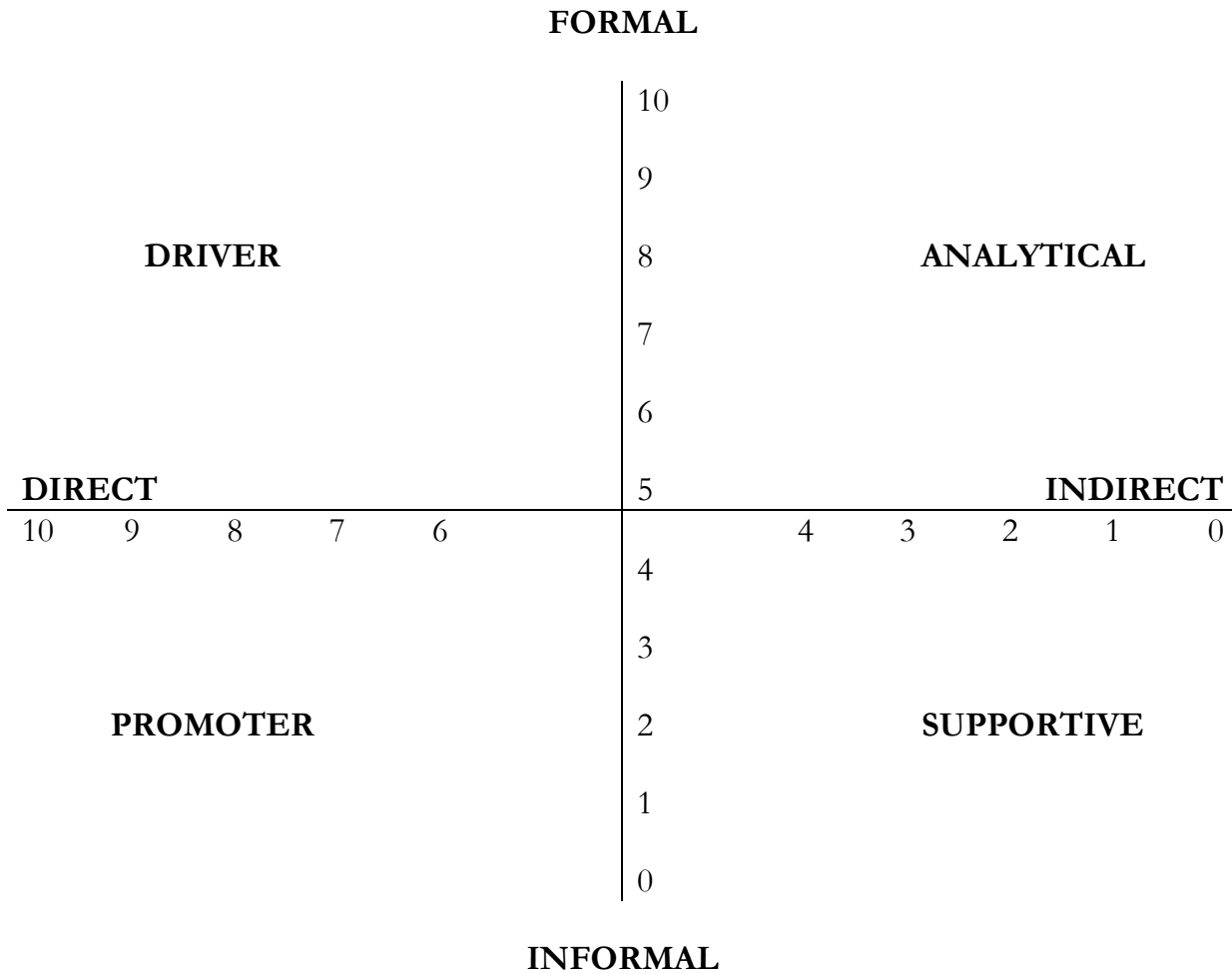
Now repeat the process, by ticking either column C or D

<b>C</b>		<b>D</b>	
More close	_____	More distant	_____
More flamboyant	_____	More proper	_____
More dramatic	_____	More matter of fact	_____
More impulsive	_____	More methodical	_____
More outgoing	_____	More reserved	_____
More spontaneous	_____	More disciplined	_____
More responsive	_____	More self-control	_____
More feeling	_____	More thinking	_____
More flexible	_____	More rigid	_____
More people oriented	_____	More task oriented	_____
		<b>Total</b>	_____

Total all the tick marks in Column D and put that score on the total line. Turn the page to record your style\_\_\_\_\_



## To Record your Personality Style



### Instructions:

1. For Column A's total circle that number on the horizontal line.
2. For Column D's total circle that number of the vertical line.
3. Connect the circles with a solid line. This represents your personality style.





## How to communicate effectively to different styles of behaviour

**Identifying different styles.** The key to effectively communicating with others is to recognise their primary behaviour style and then to adjust, that is, shift your presentation into the mode or style of the person you are dealing with.

DRIVER	ANALYTICAL
<u>Characteristics</u> <ul style="list-style-type: none"> <li>• Take charge</li> <li>• Decisive</li> <li>• Efficient</li> <li>• Determined</li> <li>• Results Focus</li> </ul> <u>Potential Liabilities</u> <ul style="list-style-type: none"> <li>• Autocratic</li> <li>• Impatient</li> <li>• Insensitive</li> <li>• Over-control</li> <li>• Poor listener</li> <li>• Reactive</li> </ul>	<u>Characteristics</u> <ul style="list-style-type: none"> <li>• Thorough</li> <li>• Rational</li> <li>• Organised</li> <li>• Detailed</li> <li>• Serious</li> </ul> <u>Potential Liabilities</u> <ul style="list-style-type: none"> <li>• Indecisive</li> <li>• Avoid issues</li> <li>• Aloof-unsociable</li> <li>• Too much detail</li> <li>• Critical</li> </ul>
PROMOTER	SUPPORTIVE
<u>Characteristics</u> <ul style="list-style-type: none"> <li>• Stimulating</li> <li>• Enthusiastic</li> <li>• Risk-taker</li> <li>• Goal driven</li> <li>• Innovative</li> </ul> <u>Potential Liabilities</u> <ul style="list-style-type: none"> <li>• Aggressive</li> <li>• Manipulative</li> <li>• Poor follow-up</li> <li>• Ego driven</li> <li>• Undisciplined</li> </ul>	<u>Characteristics</u> <ul style="list-style-type: none"> <li>• Team player</li> <li>• Good listener</li> <li>• Relationship-orientated</li> <li>• Friendly</li> <li>• Conscientious</li> </ul> <u>Potential Liabilities</u> <ul style="list-style-type: none"> <li>• Too agreeable</li> <li>• Plays victim</li> <li>• Avoids conflict</li> <li>• Acquiescence</li> <li>• Not demanding enough</li> </ul>

**Driver:** To deal with this style, you should realise that their major concern is RESULTS, and you should try to plan to communicate in an efficient, results-orientated manner.

Hints:

1. Get to the point, be specific
2. Keep the relationship business-like
3. Avoid direct disagreements or trying to tell them how it should be done
4. Don't waste time, move quickly
5. Provide options for them to choose
6. Provide overview, but have facts ready if needed

**Promoter:** The Promoter will be communicative, warm, approachable, and competitive. You will want to communicate with them in such a way that involves feelings, emotions, ideas, and goals. Promoters consider power and politics important in the communication



process and are interested in ways to enhance their personal ideas. To deal with a Promoter, you need to provide support for their ideas and aspirations.

**Hints:**

1. Ask questions to draw out their ideas and opinions
2. Let them do most of the talking, as they will try and do it anyway
3. Explore mutually exciting options
4. If you disagree, avoid arguing, instead look for alternative solutions
5. Avoid asking about details, get agreement on big picture
6. Make your presentations stimulating and exciting

**Analytical:** The Analytical will be cautious during communication and will be most comfortable with facts and data, not ideas and opinions. To deal with them effectively you need to show that you will not jump to conclusions, but allow them to get into details.

**Hints:**

1. Stick to the facts, avoid intuitive ideas or opinions
2. Be willing to help them develop their ideas
3. Be patient
4. Offer assurance when decisions are pending
5. Be organised and logical, avoid hype
6. Be thorough, avoid surprises
7. Don't push for a quick decision, give them some time to get comfortable with you and the problem
8. Ask them to help you unearth the facts

**Supportive:** The Supportive achieves objectives through understanding and mutual respect rather than force and authority. To deal effectively with the Supportive style, you should support their feelings and relationships with others.

**Hints:**

1. Take the opportunity early to show your personal interest and concern in them and their feelings
2. Be co-operative, not pushy
3. Be patient, draw out their ideas and concerns
4. Gently explore areas of disagreement
5. Indicate your willingness to provide help and assurance
6. Be encouraging, build their confidence in themselves
7. Spend time establishing a relationship before jumping into the task
8. Minimise risks, cover each step thoroughly



## Non verbal communications

Non verbal communications can support, contradict, or neutralise what you are saying, so it is very important to be conscious of your body language.

A sincere smile is a signal to the other person that you are ready to relate to them as an individual. It is an offer of friendship that is very difficult to resist. One of the reasons we tend not to smile is because we are concentrating on what we are doing. It is worth remembering that a frown of concentration is usually seen by the outside world as a sign of unfriendliness or rejection. If we remember to smile, then the act of smiling at people will tend to put us in a better mood. If we smile, people are more likely to smile back, mirroring our action.

## Positive language

Be enthusiastic and optimistic. Enthusiasm is contagious, while pessimism drags everything down. Use positive language, and paint word pictures. This is known as Neuro Linguistic Programming - NLP.

The following are 15 positive words, which if incorporated into daily use can help you to sound positive:

Discover	Good	Money	Easy	Free	Save
Guaranteed	Health	Love	New	Proven	Results
	Safe	Own	Best		

Advertisers use these words constantly to make us feel good about the products they are encouraging us to buy.

### Exercise B

**Time guide: 15 min.**

Find a newspaper or magazine, and look at the advertisements. Count the number of times each of the above words appears.

Now plan to put these words into your everyday vocabulary, over 5 weeks. Start with 3, then build up to 6, then 9, then 12, and then 15. By using positive language you will find other people are much more agreeable to what you have to say.



## Questions and answers

By asking the right questions, you can avoid misunderstandings, gather relevant information, and demonstrate to your customers that you are interested in their problem/enquiry, and want to help them.

There are two kinds of questions, OPEN and CLOSED.

Use 'open' questions when you want to involve him/her in dialogue.

Open questions require a more detailed response.

Closed questions require a yes/no answer.

For example:

### Open

“When do you expect to renew your computer servicing contract Mr Smith?”

“How do you currently plan your training budget Mr Smith?”

“In your opinion Mr Smith, which of your branches is the most profitable?”

Open questions usually start with who, what, when, why, where, how.

If you are the type of person who likes a rhyme as a way of remembering, here is one which we find useful:

I have six honest serving men  
They taught me all I know,  
Their names are What and Why and When  
And How and Where and Who”

Rudyard Kipling

### Closed

Closed questions start with are, do, were, can, etc. For example:

“Do you have a service contract for your computer hardware, Mr Smith?”

“Do you want to save 40% of your computer servicing costs, Mr Smith?”

When asking closed questions, try to word them so that the customer/prospect is replying positively, i.e. saying YES. So, for example, you might summarise what they are saying, and ask them to confirm that your understanding is correct.



Take advantage of the information available to you, whether on a credit product/serviced (in a retail situation), at a restaurant booking, a computer screen, or a switchboard operator who asks for your name before trying to connect you. Remember also that using a customer's name is particularly effective when you have to say 'no'. For example, say, "Mr Smith, I am sorry we are not going to be able to help on this occasion," and then go on with the explanation.

### Exercise C

Time guide: 20 min.

Prepare 6 OPEN questions, which you might ask your customers, using the who, what, where, why, when, how technique.

1. \_\_\_\_\_  
\_\_\_\_\_
2. \_\_\_\_\_  
\_\_\_\_\_
3. \_\_\_\_\_  
\_\_\_\_\_
4. \_\_\_\_\_  
\_\_\_\_\_
5. \_\_\_\_\_  
\_\_\_\_\_
6. \_\_\_\_\_  
\_\_\_\_\_

Then prepare 6 closed questions which you might ask your customers, worded so that the answer will be "YES".

1. \_\_\_\_\_  
\_\_\_\_\_
2. \_\_\_\_\_  
\_\_\_\_\_
3. \_\_\_\_\_  
\_\_\_\_\_
4. \_\_\_\_\_  
\_\_\_\_\_
5. \_\_\_\_\_  
\_\_\_\_\_



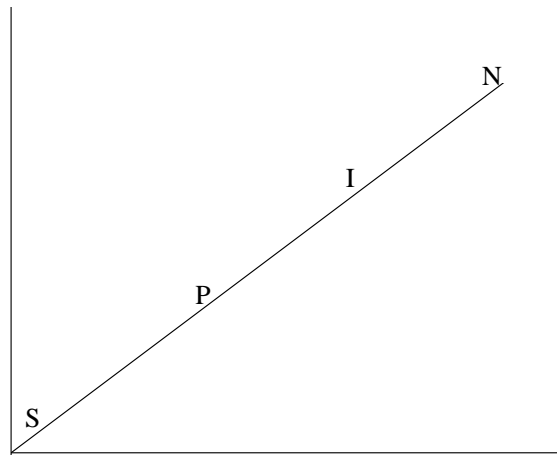
6.

## SPIN Technique

When talking to potential customers, it is essential to ask lots of questions in order to establish what the customer needs. This process helps the customer to feel in control, as he/she is identifying needs, rather than “being sold to”.

Good sales people spend 30% of time asking questions and 70% of time listening.

### SPIN Technique



#### Situation Questions:

- What is nature of your business?
- What is your current situation?

#### P Problem Questions:

- What are you trying to do?
- What do you want for the future?
- What is missing?

#### I Implication Questions: (get feelings/emotions attached)

- What happens if problems are not addressed?
- What costs are incurred?

#### N Need Questions:

- What do you need to solve the problem?
- What benefits do you need?



Questioning techniques -a useful reminder is Question PLC- probe, listen, confirm.  
When asking questions make notes (even if you think you will remember, it shows interest in what the buyer is saying)

## Learn to LISTEN

If you can develop your listening skills you will find your meetings go better, you will interrupt less and you will earn the rewards of finding out more about the other party for future reference. So use the “LISTEN” formula to keep your customer contacts, whether by phone or in person, under control:

**L** Look Interested. Look at the other party. Have a pad and pen ready to take notes where you need. Make encouraging noises and give pertinent answers. Watch the other person carefully but don't worry them by staring - this often makes people uncomfortable.

**I** Inquire. Ask questions - preferably open questions that need more of an answer than a simple 'yes' or 'no'. The more you ask, the more information you can get about your client's needs. So ask exactly what they have in mind and what they would be prepared to accept.

**S** Stay on target. Keep to the topic. You may find you get off the subject with your questions. Look for an opening to get back on track as soon as possible. A discussion about the weather is going to do you no good at all!

**T** Test understanding. People hear what they want to hear - so clarify as often as you can. Ask if you are right in your own understanding of the situation by paraphrasing what has been said. And check the other person has understood you by going over the main facts again.

**E** Evaluate the message. Watch the other person closely and judge whether they are saying what they really feel. If they say 'no' do they mean maybe? Try repeating their words back to them in the form of a question. For example, they say, "I couldn't agree to that". Return with "You couldn't agree to that?" They will be forced to explain their reasons and you may be able to come up with a solution.

**N** Neutralise your feelings. Don't over-react to what the other person says or you will stop listening and lose control of the negotiation. Let the other person have their say and remember, this is not about you, personally, it is about your product or company and the client's needs. You just need to control the situation to get the best deal possible.

Well done – you



deserve a break now!



### Exercise A

Time guide: 12 min.

You will need the help of a friend, a video camera, or the recording function on your phone for this exercise.

If you are working with a friend, ask them to choose an article from the newspaper. It should be about 10 paragraphs long. Ask them to read it through, then to read it to you aloud. Then ask them to test you on your understanding, by asking you questions.

If you prefer to work alone, tape from the TV or radio a speech programme, of about 6 minutes. Then write down as much as you can remember. Then play your recording back, and see what you recalled, and what you missed.

How did you get on?

If you took notes, you will find your concentration lasts longer. Did you find it difficult to concentrate without visual reinforcements? Did you start well, and then lose interest? Did you miss key points? Did you summarise well?

Listening is different from hearing- it requires active participation and considerable effort. However, it is a skill which, with practice, you can sharpen, and which will help you succeed in sales.





## Unit 5     Developing the sale

### The psychology of selling

#### AIDA

During the sales process you will go through the following selling stages with the customer.

#### **A**ttention

Initially you must get the customer's attention. You can do this by a polite and friendly greeting, a question, an observation, a smile, or a handshake. The important thing at this stage is to appear non-threatening, while taking control of the situation.

#### **I**nterest

Buyers are interested in benefits. You have developed your benefits thoroughly earlier in this course. Take a minute now to go over your notes.

#### **D**esire

Brings in the emotional response to a potential purchase, whether consumer or business to business. While people claim to be totally objective, most sales are based on an emotional reaction.

Psychologists have identified 6 emotional reasons why people buy:

1. Profit or gain
2. Fear of loss
3. Pleasure
4. Avoidance of pain
5. Pride
6. Desire for Approval

Think how these can be applied in a business-to-business sales situation. The profit or gain includes price, the fear of loss includes letting the buyer's competition get ahead, the pleasure can be satisfaction of a job completed, which looks good, avoidance of pain is usually related to less hassle, pride and desire for approval includes peer group or manager recognition.



## ACT

Finally you must get the customer to act. Go into every sales encounter with your own objectives. Decide which product/service you would like to sell, which you will allow him/her to buy, and even if you cannot meet his needs today, ensure his experience will encourage him/her to recommend you to his friends/colleagues, and come back another time.

“Most sales fail through lack of knowledge- about the customer, or about the product sold.”

It is important that you establish yourself as a knowledgeable professional. You should therefore familiarise yourself completely with every product/service you are selling. This sounds like common sense, but is often neglected.

**Offer proof.** If somebody else has used your product or service and found it good, get them to say so and try to apply that to the situation you’re in. If an outside organisation has tested your product or service, and found it effective, use that for additional credibility.

As you go along, **summarise your progress**, so that you can say, “Well we’ve dealt with this, we’ve dealt with that, you were concerned about that, but now we’ve looked at that”, so you get them to agree as you go along.

**Check understanding.** You do this again by questioning, asking how does that compare with what they have previously done, or does that look like it’s going to meet their needs.

## Unique Selling Propositions (USPs)

It is worth preparing a written list of USPs for each product/service-This will give you three major benefits:

1. You will be better equipped to answer questions, point out plus factors and make that sale.
2. You will be enhancing your knowledge of possible deals you can offer your customer- after a while, you will have an encyclopaedic knowledge of your sector.
3. You will have training material to pass on to your new employees, as your business grows.

## Buying signals

At this stage the customer will very often be displaying buying signals - “Have you got one available in red?” or “How quickly could it be ready?” are two obvious examples.



## Exercise A

Time guide: 10 min.

List 5 buying signals you can think of or have recently experienced.

- 1.
- 2.
- 3.
- 4.
- 5.

You can recognise buying signals both verbally and through other indications:

- He/she asks pertinent questions “Would you be interested in my product/service as part exchange?”
- The body language is clear- they lean forward, pick up a brochure/form, lots of smiling
- I really need it for a week on Tuesday
- How much experience have you had providing safety equipment in the paper business?

Buying signals when face-to-face are the same as on the phone - you need to concentrate in order to make sure you are hearing them, and respond accordingly.

## Handling objections

Many sales people become worried about objections, and tend to over-react. Objections are simply questions from the prospect, which indicate that he/she has been listening to you. They are actually a form of buying signal. The secret of dealing confidently with objections is to plan what they might be, and prepare clarifying questions, and answers expressed in terms of benefits to the customer.

## Cashing in on objections

There may be some objection which the prospect is not actually saying, and so you would need to probe by questioning to find out what is their concern.



**Raise the issue yourself.** This is very effective because it shows that you have thought about their particular problems, and are prepared to deal with them.

**Avoid arguments.** Depending on the personality style, there may occasionally be people who will try to get you into a technical argument. The best way to deal with this is to agree in part, for example by saying, “I can see that there is an alternative point of view on this subject, but perhaps I can show you another path”.

If people begin arguments, you may wish to **return a question with a question**, and for example, they might say, “Why is your product so expensive?” Your reply would be “Well that depends on what exactly you are comparing our product with?”

**Clarify.** Very often objections may actually be simply a matter of different semantics, rather than a real objection, but if the misunderstanding is allowed to develop, it will take on a much greater weight.

**Confirm decision-maker and budget.** If somebody is being very woolly about why they don’t want to proceed further, it may be worth asking when their budgets are put together, and if there are other people involved whose approval is required. This should be handled very tactfully, and it is worth preparing for that in advance with some well-chosen phrases.

Typical objections can be:

i) “It’s too expensive for my budget”

Overcome by: “What could you afford on a monthly basis?” (Also, check that you are comparing like with like).

ii) “I really wanted it to handle 30 workstations”

Overcome by: “So, if we could set it up to handle 30 workstations, would you buy it?”

iii) “I can’t afford it yet- can I wait 2 months?”

Overcome by: “We could arrange deferred payments through financing, so you wouldn’t have to pay anything for 3 months”.

iv) “I need to talk it over with my boss/colleague”.

Overcome by: “I understand it is a major decision. What information from us would you find helpful?”

v) “Another supplier is offering the same thing for £500 less”.

Overcome by: “Are we comparing identical deals?” (Detail the specification of the product/service you are showing, and examine each point).



## Exercise B - Overcoming objections

Time guide: 20 min.

Now write down some objections you think you may have, and the ways you will overcome them:

Objection:

Overcome by:

Objection:

Overcome by:

Objection:

Overcome by:

Objection:

Overcome by:



If they re-phrase an objection it means that they are interested, but the objection was not dealt with to their satisfaction in the first place. Use open questions to probe and find the real cause of their objection.

Alternatively you could grasp the nettle and test the prospect's willingness to buy, for example - "How soon do you need delivery, Mr Smith?"

By this time you should have handled most of the objections. You have gained a lot of information about the prospect and you will have matched this with the appropriate benefits.

However it is also possible that the prospect will still not be willing to proceed. You need to tactfully and sympathetically ask why, to understand their objections, so that you can overcome them and deal with their concerns.

## Negotiations

When you are getting close to the end of the Sales Process you will find yourself actively negotiating with the prospect. Negotiation is a process in itself, and, although we do not have space to cover it fully in this Unit, here are a few tips that may come in handy:

Remember everything is negotiable:

- Price
- Extras
- Servicing/support
- Delivery times

- Packaging
- Payment terms
- Guarantees
- Quantity
- Quality

The important thing in all negotiations is to put yourself in the customer's shoes, and value any concession in his/her terms. For example, you may reduce the price, if a larger quantity, more profitable item, support materials are bought.

## Key points on negotiating

- Be flexible - give on some things and take on others. Negotiation is a process of reaching mutually acceptable agreement - it's not a battle!
- Aim high - set yourself high goals on what you want to achieve



- Concede in small steps and expect the customer to concede in large steps in return
- Don't compromise too quickly - never 'split down the middle'. Hold out for what you believe represents good value for money
- Always negotiate what you believe is a reasonable deal - don't let prospects feel they are being ripped off, and don't let them think that they can rip you off!

## Closing

In every sale, you should both plan and expect to close. Keep your objective in mind at all times. You may need to close several times during the sales call.

Closing the sale is best attempted after each objection has been overcome. Effectively you are asking the prospect to commit to an agreement, but using the SPIN technique in your questions, you will enable the prospect to believe he wants to buy.



## Using “If... and then”

Throughout the sales process, you will have been asking the prospect “if” followed by a question, for example, “If I can offer you the discounted price, would you buy the product/service?”

These are deliberately closed questions to which the answer has to be “yes”, unless there is another objection. The more times the prospect says yes the more he/she wants to buy.

There will be a point where you should feel confident that you have a sale. You want to make sure that the prospect has no more objections. You have really been asking him to buy it since his first objection, so assume that the sale is on, and ask when he/she would like to take delivery/start the contract

There are several different types of close, which you will have already used in the telesales Unit, but now, need to adapt to the face-to-face situation:

## Types of close

Direct request “So I’ll put you down for 200 a month then, Mr Smith, is that all right?”

The alternative close “Would you prefer 200 a month for 6 months, or 300 a month quarterly for a year, Mr Smith?”

A combined solution “Well, given that you are new into this market, Mr Smith, why don’t we test it for 3 months, at a very special rate, and then we can roll out to the rest of your company, after that”

Final objection - ‘if’ “OK Mr Smith, if we can overcome your concerns about the service contract to your satisfaction, will you agree to the sale?”

The assumptive close “Fine Mr Smith I’ll put you down for a full system, with a service review after 6 months”.

Recommend close “Well Mr Smith, given your particular circumstances, which I can understand are very specific and detailed, I would recommend that you take product B, because I do think that’s the one, given the information you’ve provided me with, which will be the most effective for you”.

Add-on close “OK Mr Smith, now we’ve agreed the hardware, is this a good time to talk to you about a service contract?”

Immediate gain “If you take this product/service today, I can give you an additional 3 months warranty”





It is now necessary to confirm the arrangements in writing so that both you and the customer are clear on what has been agreed. As a minimum you should record:

- A detailed specification of the goods or services being provided
- The agreed selling price
- The method of payment or payment terms
- The proposed delivery date.



Well done, you can take a break now!

## Assessment to Unit 5

Ask one of your colleagues to act as a potential customer and practise your sales techniques. Ask them for feedback, and between you complete the section below. If possible use video equipment to record yourself.

	Strengths	Weaknesses
Greeting the customer		
Creating a positive relationship		
Questioning skills		
Matching needs with products		
Negotiating skills		



Dealing with objections		
Closing skills		

Now prepare an Action Plan to deal with any weaknesses. Repeat the exercise at regular intervals and monitor your progress. Selling is all about getting all the little things right, so continuous monitoring and actions leads to improvement.

### My Personal Action Plan

Action/information	What I will do	By when	Checked



## Unit 6 Sales Management

### Forecasting and Monitoring

In Unit 1 you set some SMART objectives. Now that you have worked through the course, you should be thinking about whether those objectives have been met, or need refining. If working in an organisation, the objectives should be mutually agreed between you and your manager.

You can also build in the sales targets you have set earlier, or you can use this to adjust your longer-term objectives.

### Monthly objectives

#### Exercise A

Time guide: 15 min.

Review your SMART objectives using these questions. Then revise your monthly objectives as required.

In order to stimulate interest in your range, what marketing activities are you going to complete this month?

What product familiarisation are you going to complete this month?

What personal development activities are you going to complete this month?

What profit per sale/percentage mark-up do you expect to achieve from each unit?

Review your objectives at intervals, depending on your business and industry, either with your manager, or simply for your own information. Be sure you look at what you did, what you did not do, and think about the reasons why in both cases. Perhaps your goals were not realistic? Perhaps they were a bit vague? Perhaps there was bad weather or good weather that kept people at home. Whatever the reason, you can improve your performance by regularly checking and adjusting future objectives based on your increasing experience.



**Hot tip!** Choose a date each month, and make a note in your diary to review objectives at that time. If you don't schedule it in, it may not get done.

## Sales Objectives

Almost certainly you will be asked to provide regular sales forecasts - how many deals you are projecting to sell over the next period. In providing this information you should take account of:

- Past (recent) sales performance
- Sales trends
- Market conditions
- Comparison of your products vs. your competitors'

You should also feed in any further sales opportunities you have identified.

Treat the preparation of this information as important and useful, not as a chore. Use it to help plan your activities and how you are going to improve your performance.

## Evaluating Sales Performance

Your performance should be regularly reviewed against the objectives you are setting yourself. Take a few minutes to review after each sales meeting. If it was successful, why was it successful, and if not, why not? This will help you identify areas where you can improve your performance.

If possible, ask a third party to evaluate your performance - your boss will often give valuable feedback on how well you are doing.

If for some reason you are 'having a bad month', it could be due to factors outside your control. Regular reviews will help you identify a pattern, and you will be able to take corrective action.

Depending on the industry, you should expect to work around the following ratios:

200 phone calls = 70 contacts = 10 appointments = 4 sales

If you are selling more than 4 out of 10 appointments, this could be accounted for by one of several reasons:

- a) You are a very good sales person- take a bow!
- b) Your product is very attractive in this market- what else could you sell to the same people?
- c) Your prices are too cheap- consider an increase.



If you are winning fewer than 4 out of 10, consider the following:

- a) It is a competitive market- can you add value to make your product/service stand out?
- b) Are you working in the best market place for your product? Is there a better niche market you could find?
- c) Are your sales techniques as good as they could be? Examine each stage of the sale from your records, and find out who won, and why.
- d) Check your prices. If you are significantly more expensive, can you reduce costs/ demonstrate added value/ un-bundle the offering so that you can compete on price with a more basic version?

## Apply positive thinking

Successful selling is built on confidence and persistence. While it is important to analyse why we won or lost a sale, we should also not allow ourselves to fall into the pit of superstition, or despair.

This can let us believe that we are not successful because:

- It rained
- No business can be done on Monday mornings or Friday afternoons
- There is too much competition
- You cannot do anything with a customer who has said no
- That you are having bad luck
- That you cannot learn from every day, and from your colleagues
- That everyone else has easier targets

This is negative thinking, which will reduce your confidence and opportunities for success.

## Use affirmations to stay positive

Many successful sales people have a set of affirmations like those below which help them to stay positive, and stay on target. You can use these, or adapt/make up your own.

### My affirmations

I am happy. I am smiling. I enjoy my work.  
I like meeting people, and learning about them.  
I enjoy finding out what is going to let them buy.  
I see every prospect as a customer.  
I see every objection as a buying signal.  
I want to learn something new every day.  
I recognise negative emotions, and will turn them into positive energy.



## It's not over till it's over!

**Follow up.** Be sure to follow up all your sales/contacts.

**Be persistent and systematic,** you may be fed up contacting them, but they don't know about half of the messages you've left.

**Keep in touch.** Even if you haven't sold them anything this time, they now know about you and by keeping in touch you will keep in the frame for any future work.

**Keep your promises.** If you say you will get back to somebody with a proposal within 7-10 days, don't leave it for 3 weeks, because they will certainly have forgotten, and be less inclined to deal with you.

**Welcome complaints.** It's not a perfect world, and sometimes customers complain. It's the way you deal with complaints which separate the successful companies from the mediocre.

**Say thank you.** Remember to say thank you for the business, it's good manners and helps build the relationship, which can lead to more business.

## Customer Care

"It costs you five times as much to get a single customer as it does to keep one you already have."

"No matter what your business is, you're probably overspending on customer acquisition and underspending on customer retention."

"Most businesses lose about 25% of their customers annually... cut just 5% of that customer loss .... add 100% to your bottom line"

Don Peppers/Martha Rogers, The One-to-One Future

A wise sales person looks at the long-term value of the customer. When handing over a customer to the operational side of the business, ensure that communications are clear, and the customer knows who can help.

If you set up this part of the process carefully, you will be abler to concentrate on selling, and work towards repeat business for the future.

Customer care tips:

- Under promise and over deliver - if you exceed the customer's expectations he/she will feel good about you and your company. Your relationship will be enhanced.
- Hand-over efficiently, so that the person who will continue the relationship will reinforce the messages you have been giving to the customer.



- Deal with customer complaints responsibly (see below)
- Respect their views. The customer may not always be right but they are always the customer.
- Listen actively. There is a huge difference between listening and hearing. With listening you have to actually process the information, without getting bored, fed up, or giving up halfway.

## Customer complaints

If any customer complaints are received, these should be dealt with according to your organisation's procedures and customer service standards. Complaints must be sympathetically received, and their exact nature tactfully established. You then need to fully research the complaint and agree a course of action with the customer. The nature and outcome of all complaints received should be documented so that they can be analysed for trends in order to implement improvements.

## Summary

Successful selling comes through recognising the separate stages in the process, paying attention to the details, and always trying to do better next time.

The steps are:

- Plan and set goals
- Prepare yourself
- Prepare your product knowledge
- Prepare your customer situation
- Make Prospecting a regular routine
- Understand your customer
- Plan your questions in detail
- Develop your listening skills
- Present benefits/solutions
- Deal with objections
- Close and commit
- Don't fall down on the follow-up
- Recognise the opportunities from lifetime customers

**Congratulations - you have now completed the Sales Consultant course.**

Please take every opportunity you can to use what you have learned in this course. It will help you and it will help your organisation. Good luck!

## Assessment to Unit 6





1. When providing information for a sales forecast, you should take account of:
  - a) \_\_\_\_\_
  - b) \_\_\_\_\_
  - c) \_\_\_\_\_
  - d) \_\_\_\_\_
  
2. When evaluating sales performance what would be your expected ratio of sales telephone calls to actual sales?  
\_\_\_\_\_
  
3. Write down 5 affirmations to stay positive:  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
  
4. Write down 5 affirmations of your own  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_



### Sales Planning

Write a **sales plan** for your Sales Department. There's no time guide for this part - take as long as you need to complete a thorough plan. Use the exercises you have completed so far to help you.

The plan should cover the following:

1. The sales objectives for the coming year.
2. An action plan describing how the objectives will be met.
3. What resources will be needed to achieve the objectives?
4. How you are going to measure the effectiveness of the plan throughout the year.
5. What you need to know to be more effective.

#### Sales Plan

Date:

Objectives:



## How to obtain your certificate

If you have completed this course, please send a copy of:

- a) Your completed Unit Assessments
- b) Your Personal Action Plan

To: The Assessment Centre  
I-Marketing Services Ltd  
10 Valiant Way  
Christchurch  
Dorset  
BH23 4TW

Together with your name and address.

Our assessors will check the standard of your work and if satisfactory, an I-Marketing Services Ltd Certificate will be issued.

