



Sales Planning and Preparation

Self Analysis Checklist

On average, how much time do you spend planning for a call to a new customer?

Which of the following techniques do you use? Circle answers from the options below:

Knowing your customer

- I look at their website.
- I search for articles and related information about the company.
- I ask my friends and colleagues if they have any information about the company.
- I make a list of individuals/companies I think are their customers.
- I make a list of companies I think are their competition.
- I make sure I know the name and position of the person I will be meeting.
- I bring any relevant contact numbers and information in case of emergency.

Personal Appearance

- I polish my shoes.
- I make sure my hair is neat and clean.
- I check my fingernails and hands are clean.
- I brush any dust or suchlike off my work clothes.

Transportation

- I check where the meeting is well in advance.
- I make sure my car or bike is clean, well maintained, and has fuel.

Sales focus

- I write an objective for the meeting.
- I plan my opening remarks for the meeting.
- I plan the qualifying questions that I will use.
- I write out a list of needs analysis questions I can ask.
- I prepare presentation notes about our service.
- I identify specific benefits from our service for this customer.
- I list all the objections I can think of that they might have to using our service.
- I prepare a least one answer or alternative to overcome each of the obstacles.
- I prepare all materials that I will need to bring a day in advance.
- I practice saying all of my information, as well as my closing techniques.

What will you do differently next time?
