

Sales | Planning Checklist

Use this form to ensure that you take a prospect step-by-step through a proven sales process. This checklist is based on several tested, widely-accepted sales planning theories, including Buyer Resolution Theory and Need-Satisfaction Theory. The basic idea is that people buy products or engage professional services based on deciding that their needs will get met by what you are offering. In other words, they'll hire you or buy from you if they feel that what you offer them is a solution to their problems, dreams, etc. This checklist takes you through every step of the sales process so that you can plan your response ahead of time. It also makes it easier to develop marketing pieces. Just be sure to answer each issue on this form in your piece (not necessarily in the order below, and not necessarily all in one piece—use several letters, brochures, etc. if needed). **Note:** If you have a professional practice you may not see yourself as “selling”, but if you present what you do to anyone, that is a form of selling.

Phase One: Discover The Need

The BIG Question: “Why should I buy/hire you?”

Step 1. Discover what needs and solutions the potential buyer is looking for so you can customize your presentation to his/her needs and wants.

Step 2. Get the info you need so you can later help the potential buyer see how your product/service will meet the needs.

Step 3. Select your methods (check all that apply):

- ☐ I know my potential buyer's biggest needs through previous interactions. The 3 most important are: _____
- ☐ I have a good guess about what his/her needs are based on experience with similar buyers or through other methods.
- ☐ I need to find out what his/her needs are through:
 - ☐ Asking questions
 - ☐ Survey
 - ☐ Reading company material
 - ☐ Talking to others who know him/her/the company
 - ☐ Reading market research and other literature on his/her situation or industry
 - ☐ Other (specify): _____
- ☐ Write in one sentence how you want your potential buyer to answer the question in his/her mind after your presentation, _____
- ☐ “Why should I buy/hire you?” _____

Phase Two: Identify The Potential Buyer's Solution Set

The BIG Question: “What should I buy?”

Step 1. Each potential buyer has some ideas in mind about the kind of product or service that will meet his/her needs—a set of solutions in their mind. You need to find out what else they've been considering, and why. What are their key criteria or requirements. This will allow you to stress the benefits of your approach or product in contrast to the other options they have been considering. You will also get an idea of what price range they've been considering.

Step 2. Select Your Methods (check all that you will do):

- ☐ **Check prospective alternative solutions:** Ask, "What have you been considering you should do about it?"
 - ☐ **Check past alternative solutions:** Ask, "What else have you been trying?" or "How do you handle XYZ situation, typically?"
 - ☐ **Check satisfaction/dissatisfaction:** Ask, "How has that been working for you?"
 - ☐ **Check important values/criteria for buying:** Ask, "What makes that important to you?", "Sounds like you've invested quite a bit of money/time/people in that project. What factors went into that decision?" Or just ask directly, "What Are the Key Issues in Your Buying Decision?"
 - ☐ **Check reference groups:** Ask, "Do you know anyone who has tried a financial consultant? What do you know about their experience?"
- Check their perceptions of your products & services:** "What have you heard about what we offer?"
- ☐ **Anticipate the prospect's "objections":** Objections are just another way of finding out their key criteria and the alternatives they are considering (including doing nothing right now!). Discovering these objections gives you good clues to their solution set. List out the 3 biggest:

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- ☐ **List the 3 biggest competitors' services or products you face. Compare your position against those:**

<i>Competitors' Product/Service</i>	<i>Your Advantages</i>

Phase Three: Present Your Benefits and the Features That Produce Them

The BIG Question: "Where should I buy?"

Step 1. Help the potential buyer see that you offer the solutions they are looking for;

Step 2. Help the potential buyer see that you offer *the best* solution out there.

Step 3. Select your methods (check all that you will do):

- ☐ Use the **Benefit → Features** approach to explaining what you offer. Start with benefits the potential buyer wants (based on needs) and then show how your product or service will meet that need. This is one of the most tested approaches there is.

<i>Benefit the Potential Buyer Desires</i>	<i>How You Provide It</i>

- **Testimonials & Success Stories.** Tell the potential stories of who else has used your product/service and the results they've gotten or their satisfaction with what you gave them (can show written testimonials with permission). Be sure to emphasize results (benefits) whenever possible.
- **Show and Tell.** Demonstrate your product or service in action. Could be a "freebie" they can walk away with or something you will demonstrate to them. E.g., offer a free consultation. Key is to make it a "before and after" like the weight loss programs.
- **Pre-Handle "Objections".** Rather than wait for your potential buyer to voice objections, answer the biggest ones up front. In direct mail this is done by saying something like "The 3 major reasons some people don't buy from us:..." In personal selling you simply address these reasons right in your presentation.
- **Trial closes and probing.** Instead of (or in addition to) pre-handling objections, you can attempt to "close" the potential buyer by getting some kind of commitment for the next step and then seeing what their response is. Probe for objections with questions like, "Sounds like you're wondering about something..." "I'm sure you have a good reason for saying that (objection). Would you mind telling me what it is?"
 - **Confirming questions:** After you present a benefit, ask "You are interested in a more exciting relationship, aren't you?" or "You did say you wanted more profits, didn't you?" This gets the potential buyer beginning to say "yes" to the idea of buying those benefits.
- **The Single Next Step.** Some sales trainers recommend you break down the "sale" into steps, and walk your potential buyer one step at a time unless you get strong buying signals. Before you call on your potential buyer or send a sales letter, identify *exactly* what the step is that you want them to take:

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- **Comparisons.** Will you make direct comparisons with competitive products, services or solutions? If so, plan it out well, ideally in writing on a comparison chart, which is usually more subtle than a verbal comparison (which can sound like an attack on others).

<i>Feature/Benefit Desired</i>	<i>Their Product/Service</i>	<i>Our Product/Service</i>

Phase Four: Negotiate Fees or Prices

The BIG Question: "What is a fair price?"

Step 1. Help the potential buyer see that you offer the solutions they are looking for at a great price.

Step 2. Select Your Methods (check all that you will do):

- **Cost/Benefit Analysis.**

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