

Sales Call/Visit Checklist

By Campbell Rodriguez

- Preparation
 - Research your Account/Client prior to the call/visit
 - Learn something about the Account/Client and their business.
 - Have three value-added points prepared.
- Thing to ask for MASTV DATABASE
 - NAME of Business
 - Name of Owner(s)
 - Visit
 - Called
 - Date/Time:
 - How long was call or visit
 - What part of Austin
- Introduction -
 - Find out the names of contacts in their business.
 - Find out who are the decision-makers are.
- Sales Question and Strategies
 - Ask about the business goals.
 - Ask what challenges the company is facing in Marketing
 - Ask if they ever have done any Marketing, and with who? And are they still doing business with them
 - Talk about benefits
 - Give a general overview of the product and services that are offered
 - Stay focused on the customer's needs; When going over our product and services
 - Summarize the prospect's needs and how our product or service meets those needs.
 - Spend 80 percent of your time listening and only 20 percent talking.
- Closing
 - Get the customer to identify all possible problems that might be solved by the product or service.
 - Get the customer to identify the value of solving the identified problems.

Ask for the order.