

Sales Checklist

By Campbell Rodriguez

- Sales Planning
 - Garther information about caller and company background.
 - Research what prospect wants to accomplish.
 - List prospect contacts who will be involved in decision making process.
 - Initiate contact: 'sell the meeting'.
- Before Interview with Prospect
 - Look for additional information such as in trade magazine articles.
 - Call referral source to thank and gain information about "lead".
 - Use additional "network" contacts and other relationships.
 - Find other people who might know about the company.
 - Find industry contacts to give background information.
 - Gather samples of our work.
 - Prepare reference list including names and phone.
 - Prepare written material as necessary such as business cards or brochures.
 - "Role-play" the discussion with another partner.
 - Determine what prospect wants to accomplish as a result of using your firm's services.
 - Determine what benefits might be of interest to the prospect and shape your firm's services.
 - Develop responcees to objections.
 - Send a confirmation of the meeting.
 - Make sure to get to meeting on time.
- Interview with Prospect
 - Get ideas for small talk.
 - Prepare transition including thanking prospect, expressing interest in working with them and stating the purpose of the meeting.
 - Keep a positive attitude.
 - List three things that differentiate you and your message in a positive way from your competition.
 - List three reasons that explain why you're unique.

- End with a question or statement that will either close the deal or move the sale along in the right direction.