

# 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.