

SALES PROCESS – PREPARATION WORKSHEET

CUSTOMER & DATE:

PREPARE	ACTIONS / NOTES
OUTCOME FOCUS Have a SPECIFIC Focus. Consider outcomes before action.	What type of Meeting is this (FIRST or PROGRESS) and what is your specific objective?
HAVE A CREDIBLE REASON <u>Weapons of Influence:</u> Liking, Reciprocity, Authority, Social Proof, Scarcity, Proximity	Consider 1 – 2 Compelling Stories to Engage Customer.
BUILD RAPPORT & CREDIBILITY Zone of Trust = Rapport Score + Credibility Score	- What is your Zone of Trust score? - How do you improve?

SALES PROCESS – PROPOSE - WORKSHEET

PROPOSE	ACTIONS / NOTES
EXPLORE & LISTEN Pre-Determine Broader Needs and Questions. Gain Permission to Ask. Listen for Cues.	• Pre-Determine Customer's Broader Needs. • What questions can you ask?
GAIN PERMISSION TO OFFER A SOLUTION Confirm Customer's Needs. Gain Permission to Help. Be a Trusted Adviser.	• Script how you would gain permission to offer a solution.
OFFER SOLUTION Predetermine Solution. PRACTICE your Valuable Solution. Create Quality Proposals.	• Predetermine Solutions for Customer's Needs. • How will you Deliver / Document?

SALES PROCESS – PROCEED - WORKSHEET

PROCEED	ACTIONS / NOTES
ASK FOR THE OUTCOME Confidently Ask. Assume Interest & Willingness to Proceed.	• Script how you would specifically ask for an outcome. • Identify & Challenge Limiting Beliefs.
HANDLE OBJECTIONS <u>Strategies:</u> Hypothetical - Reframe - Park It - Utilize Objection - Social Proof - Feel, Felt, Found - Question It	• Predetermine Objections / Prepare Responses
SECURE NEXT STEP Know Your Next Steps. Make it Easy. Diligently Follow Up.	• Identify Potential Next Steps. • Script how you would specifically propose Next Steps & Follow Up.

SALES PROCESS – POST MEETING NOTES

**Review meeting notes and identify WHAT WORKED and WHAT DID NOT.
Ask yourself WHY.**

Clearly outline next steps/actions with specific timeframes.