Planning & Structuring
The Sales Interview

Getting & Keeping Control
Planning & Structuring The Sales Interview

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Having booked the appointment to see a potential customer it is important for us to plan and prepare effectively for the sales interview, or sales call, as we can refer to it. One important aspect of planning is the setting of sales call objectives.

Sales Call Objectives should be set prior to the call taking place. To be effective your sales call objectives should be SMART:

• Specific
• Measurable
• Achievable
• Realistic
• Time bound

Also, it is important to have at least two objectives for each call

Primary Objective

What you wish to achieve from the call. This is your main objective, such as, ‘to sell a specific product to the customer’. Also, before you go into the call, think of the person who you are about to visit. What do you know about them? Based on the information you have, think about things like:

• What questions do I need to ask?
• What kind of products is this person most likely to need?
• What would motivate this person to buy those products?
• What would I be looking for from the sales call, if I were the customer?
• What assumptions can I make, before the call that can be tested out during the call?
Secondary Objectives

These are ‘back-up' objectives in case you fail to meet your primary objective. For example, ‘to gain the customer agreement to a follow-up call, in three months, to review their position', or ‘to update the customer on our existing product range' By having both sets of objectives you are able to be successful even if your primary objective is not achieved.

Visuals

Being well prepared also means having a supply of the appropriate literature plus any equipment or sales aids that you will require to carry out the call successfully.

Questions

To be thorough and well-structured with our questions is important. We need to base our questions around the following key areas:

- The contact
- The organisation
- Current supplier
- Problems
- Needs
- The decision making process
- Competition
- Finance

Agenda

You need to have a think about your agenda for the meeting. This basically tells the customer who you are, where you are from and what is going to happen during the meeting. The purpose of the agenda is to gain control and earn the right to ask questions.

An example of an agenda which we will look at again later is:

“Thank you for seeing me today Mr. Smith. As you know my name is Frank Atkinson from TSTC Limited. You may not be aware, but at TSTC we offer a wide range of training products and services. “

“In order to see whether any of these might be of interest to you, I need to begin by asking you a few questions. Would that be okay? “

“Firstly, is there anything specific that you would like to discuss at today’s meeting? “
Attitude

The final part of preparation is to be positive about how you envisage the final outcome of your sales visit. Think success!

Successful people often visualise a positive outcome before even meeting the customer. They are confident and expect to do well. Think positively and imagine yourself after the call is over, with a positive result. You will not always be successful, but thinking positively will make you successful more often.

Structure

When selling, face-to-face, we need to be in control of the sales call without dominating the interview and making the other person feel under pressure. In order to achieve this we work to a structure.

Structuring the sales call is important because

- it gives us confidence
- it gives the other side confidence in us
- it provides a reference point should the call move away from the structure
- it keeps us in control

The structure we will recommend is simple and can actually be used for any product or service that is being sold. The structure is:

- Open the Call
- Set the Agenda
- Ask Questions
- Identify Needs
- Present the Solution
- Gain Commitment

Looking at the structure in more detail: Open the Call

This should be kept to a realistic timescale. The purpose is to introduce yourself to your customers and establish rapport before moving into the business part of the call. Avoid being too familiar at this stage unless you know the customer well.

Ask low risk questions. Be friendly, but not over familiar.

Set the Agenda

This phase signals to the other side that you are doing business. The purpose is to put you in control and establish how the sales interview will be structured. It also gains you the right to ask questions. An example of an agenda statement is:

“Thank you for seeing me today Mr. Smith. As you know my name is Frank Atkinson from TSTC Limited. You may not be aware, but at TSTC we offer a wide range of training products and services. “

“In order to see whether any of these might be of interest to you, I need to begin by asking you a few questions. Would that be okay? “
“Firstly, is there anything specific that you would like to discuss at today’s meeting?“

This gives the customer confidence in you and the opportunity to contribute to the meeting. It can also identify specific needs early on in the call.

**Ask Questions**

Selling is about identifying and then solving problems. The next stage therefore is to ask questions in order to identify and explore customer problems.

**Identify Needs**

The process of asking questions will clarify the customer’s problems in his or her mind and give you a clear idea on whether a feature or features of your product could solve those problems and satisfy the customers’ needs.

**Present the Solution**

Having clarified the customer’s problems and identified needs, present the Features, Advantages and Benefits of your own product in such a way that the solution meets the needs of the customer.

**Gain Commitment**

Having presented a solution that meets the customer's needs the next phase is to gain commitment, from the customer, to go ahead or else for some future action that will move you nearer towards the sale being made. You may well meet with objections at various stages of the sales process and techniques will be developed for dealing with objections later in the programme.

The next stage is to practise using the sales structure and become familiar with this approach, so that it becomes second nature.

The structure takes into account that there may be more than one sales visit made before the actual sale takes place. At each stage the salesperson should seek some commitment from the customer to advance the sale to the next stage in the process.