

Pre-call Planning: The Forgotten Sales Step

By Gary Walker, Co-founder of CustomerCentric Selling®

I've been thinking about writing this article for quite some time. Aside from finding the time, I have been struggling with how best to present it. How could I make it relevant, short and impactful, while at the same time providing you, the reader, with useful/tactical information that you can immediately benefit from and put into practice? I'm going to hope the following works.

The number one core concept within CustomerCentric Selling® that we ask sales people to subscribe to is, *"No goal, no prospect."* The admission of a goal by a prospect is the catalyst, the launching pad, the beginning of the sales cycle. However, I'm finding very few sales people are one, identifying the *goal*, and two, consciously *preparing in advance* of the call to *identify the goal*.



As I work with sales people, sales managers, reviewing loss reports, and editing Champion Letters, there is a theme that has been emerging. I'm finding that sales people are acquiescing to the prospects weak response to the question, *"What are you hoping to accomplish?"*

When I review these letters that are supposed to be written to document and confirm the discussion between that sales person and the prospect, I'm finding no *goal* admitted by the prospect. Or, if there is any *goal* at all, it's something like...

"You told me that your primary goal is to learn more about my company."

That's not a business goal! It's hard to 'diagnose with bias' a goal like that! And what is the proposed usage scenario going to be...

"When wanting to learn more about my company, would it be easier if you could access our website from your workstation, obtain all the information you need, and not have to talk to a sales person like me?"

It only follows, that the rest of the letter is going to be poor and this sales cycle is off to a bad start, if it even starts at all.

Students chuckle when I say, "Pre-call planning is more than having MapQuest directions and a telephone number in case you get lost."

However, the reality of the situation is that I find very few sales people who are doing much more than that. Very few are doing the research and preparation they need in order to plan to make a productive call by obtaining the information they need to determine if this is indeed an opportunity for them and their company or not!

So, to better relay the point, here are the Top 10 Reasons for Pre-Call Planning:

- 1. Plan to obtain the information you need.** What information are you are going to need and, what questions are you going to need to ask, so that you can answer the 'Debriefing Questions' posed to you by your manager?
- 2. Allows you to anticipate and prepare.** When you receive a weak response to the question, "What are you trying to accomplish?" do you have a **menu goals** that you can use, the corresponding **SDPs**, and associated **success stories**?
- 3. Prepares you to bring and add value to the conversation.** Prospects are looking for help. That's why they have agreed to speak with you. Are you prepared to converse about the prospects goals/problems or issues or, are you simply there to present your offerings features and function, much like a peddler?
- 4. Prepares you to converse knowingly and effectively.** You want to be prepared to discuss what is important to your prospect. Use the Sales Ready Messaging® tools developed by your company. That's why they were developed.
- 5. Demonstrates your competency and situational fluency.** People want to do business with people who empower them and who can help. Are you prepared to *converse* about what your prospect is trying to accomplish, what's preventing them from accomplishing it, and positioning your capabilities as a way to potentially achieve their goal? Your most important tool is your ability to *converse*.

- 6. It's professional and differentiates you from the peddlers.** Let your competitors talk about budgets, timelines, and demos. You want to talk about what is important to your prospect and, your prospect wants to talk about what is important to them. You'll be viewed as being different.
- 7. Respects the prospect's time and yours.** Your prospect's time is important and so is yours. If you are going to spend 30 minutes to an hour with a prospect, obtain the information you need by preparing for the conversation in advance.
- 8. Develops a good selling habit.** Enough said.
- 9. Repeatable and prevents shortcuts and carelessness.** Shortcuts and our failure to follow our sales process is what gets us in trouble.
- 10. Potential for better and more efficient sales calls.** Sales calls and meetings can be viewed as an intrusion on the prospect's time. You want to maximize the use of their time and yours. Get the information you need by being prepared and deliberate.

I tried to have some fun with the topic but, did I make my point? As a former athletic coach once said, "The will to win is not nearly important as the will to prepare to win."

I'd like to ask you to please prepare to win. Make pre-call preparation part of your sales process.