Unit One

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Unit One: Buying and Selling

"The outstanding leaders of every age are those who set up their own quotas and constantly exceed them."

- Thomas J. Watson (1874-1956), Chairman of IBM

In sales there are those whom are successful and those whom are not. Of the ones that are successful, some are in the right place at the right time, but that won't last and cannot be sustained or systematically replicated. The successful ones continue to be successful regardless of what they are selling, who they are selling for, when they are selling and whom they are selling to…these are the salespeople you want to model. Their success is always rooted in "how" they are selling.

The successful Account Manager understands the definition of selling…uncovering a prospects needs and then positioning their product or service as the best selection to fulfill that need. Why do people buy? People buy to:

1) ____

2) ____

Selling4Success is the iSpeak course developed to introduce you to the science of selling. While many may claim that "you are either born with it or you aren't when it comes to selling skills that is a myth. Selling is a skill that can be learned. Just as a sports skill like baseball can be learned, so is the skill of selling.

In this unit you will learn:

- Why to focus on selling value?
- The importance of Features, Advantages and Benefits
- Selling as a Process

Selling Value

"Price is what you pay. Value is what you get." – Warren Buffett

In a proper selling process, when a buyer's perception is created around a specific product or service, they will automatically derive a ballpark figure in their head of the pricing. When the pricing is well above that expectation, you will be seen as "expensive." If the pricing comes in below their expectation, you will be seen as a "good value."

Selling success depends more on the work you do early in the sales process than on the final negotiation. Perceived value of your offering and the buying urgency you create with your prospect provide the fuel to complete the sale. The stronger the perceived value and urgency by your prospect, the better off you will be in the negotiating process.

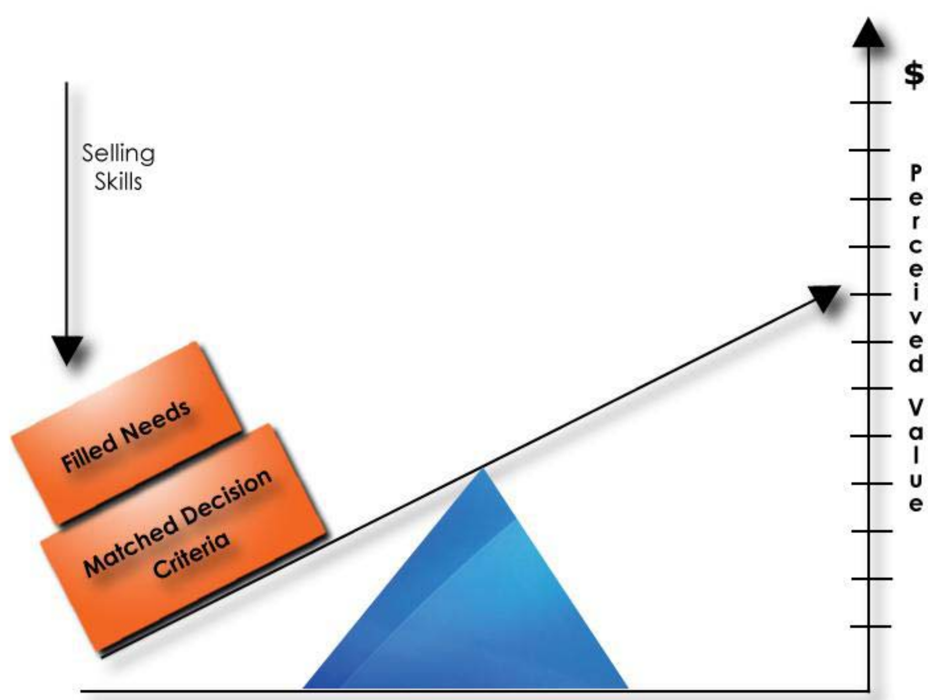
Great front work (asking open-ended questions, delivering key benefit statements, responding to objections appropriately, etc.) combined with the delivery of strong value will further strengthen your negotiating position. The graphic below depicts how selling skills and a product or service that fills a need and matches the customer's decision criteria will have a higher perceived value to the prospective client. This makes the price less of an issue.

The three keys to lowering risk and increasing value are:

1) ____

2) ____

3) ____



iSpeak Sales Model

"He who asks a question may be a fool for five minutes, but he who never asks a question remains a fool forever." – Tom Connelly

It is important to understand the buyer process so that you know what is going through the buyer's mind as they review salespeople and the services they can deliver. Without an understanding of the buyer's process, it will be impossible to navigate effectively to a completed sale. Understanding the buyer process allows the salesperson to create an alignment between buyer and seller.

Selling is the management of a process. As a salesperson locates more opportunities, they will move through this process. Not all opportunities will result in a closed sale. Some will be lost, others canceled by the buyer, and even more may be qualified out by the salesperson as not worth pursuing.

Where Do I Find Prospects?

"The nicest thing about not planning is that failure comes as a complete surprise and is not preceded by a period of worry and depression."
- John Preston, Boston College

Too often salespeople equate prospecting with cold calling. While they are related, cold calling is a subset of prospecting, it does not have to seem quite so disconcerting. While we advocate continuous prospecting, we are not that fond of the cold call method of prospecting. In this section we will explore the multiple different methods for prospecting for new business.

Phone prospecting

Phone prospecting is also known as "cold calling." Phone prospecting, even though it has a very low success rate, it is still a very effective way to cover a large territory in a very short period of time. A key to success in phone prospecting is proper development of a script.

Warm calling

Warm calling is also called a "follow up call." This is the method used by individuals who prefer to mail information first, and then follow up with a phone call to take the temperature of the prospect.

Networking

The best networking successes come from your personal network of contacts. It is important to make sure that you are effectively working and growing your personal network. It also needs to begin with you doing something for someone else.

Clubs are a great method for networking; however, they will most likely not happen on your first attendance. Invest the time in the club or organization of your choice and become an active member.

Referrals

This is the number one method for obtaining qualified leads that will eventually turn into sales. A referral from a current customer or acquaintance should be treated like a precious gift.

Inbound leads

Inbound leads are phone calls, emails or faxes that come from an unsolicited prospect. These types of leads, while always a nice surprise, still need to be qualified properly.

Purchased leads

Sites such as SalesGenie and infoUSA can provide a good place to start. In addition, Dun & Bradstreet reports or research on web sites like Hoovers or OneSource can be used to research companies.

Cold knocking

While door-to-door salespeople seem to be a thing of the past, it can still be an effective method for locating new prospects and leads.

Contacting Prospects

"For every sale you miss because you're too enthusiastic, you will miss a hundred because you're not enthusiastic enough." – Zig Ziglar

Phone prospecting has changed substantially over the past few decades, but using the phone as one of the tools of the trade has remained the same. Regardless of whether you are inside sales or outsides sales, if done properly the phone as a tool for prospecting can be very effective. In this section, we will not only discuss the most effective methods for phone prospecting, but email prospecting, as well.

Phone

Contacting prospective customers via the phone (i.e. cold calling), may not be the most effective method for locating new sales opportunity leads, but can still be utilized. The most important success factor when phone prospecting is to have an effective message. That message needs to be for starting a live conversation with a person or for leaving a voice mail that will solicit a call back.

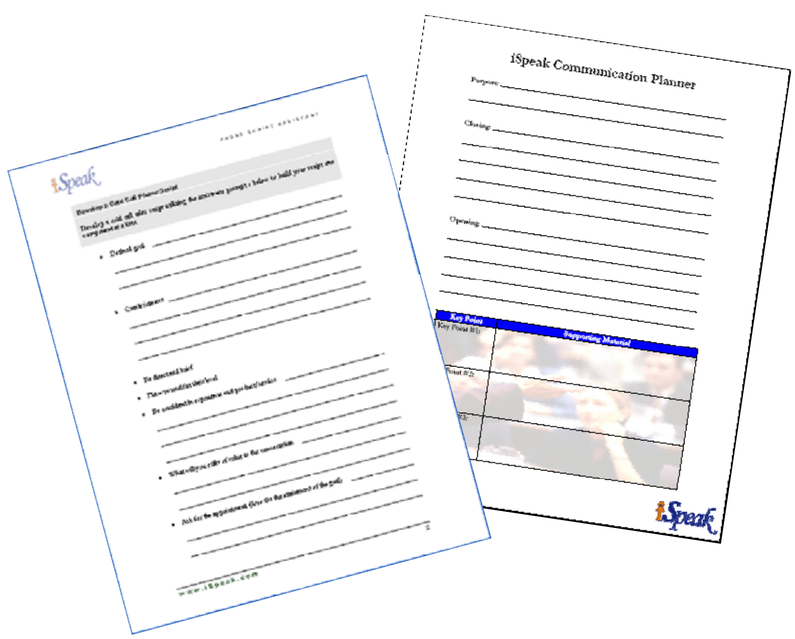
Email

More and more, the greatest challenge with prospecting over the phone has become the voice mail. With the ability to screen out sales calls, prospects have also become much harder to reach. As such, unless you can reach them live and in person on the phone, you're chances of speaking to them have decreased tremendously. Many individuals today prefer receiving email messages as opposed to voice mail messages because they can respond at their convenience and the conversation is documented. However, studies show that email communication is ineffective unless a relationship has already been established with either phone or face-to-face communication.

Sending out email communication prior to any other type of initial communication via phone or face-to-face may be interpreted as "phishing" or spam. Therefore, cold emails must be utilized with caution. In some cases, an email message as a follow up to voicemail message can be effective.

Tools

- iSpeak Call Plan Assistant
- iSpeak Phone Script Assistant
- iSpeak Communication Planner



Exercise: Preparing to Create a Phone Script

Answer the questions below to formulate an effective phone script.

What level of the organization are you calling on? ____________________

What are the most common needs and concerns for a person in this role?

____

____

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____

How are people at this level graded on their work? What determines their success in their role?

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What will most likely be the decision criteria for a person at this level of the organization?

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What problems have you solved for individuals at this level with other companies?

____

____

____

Exercise: Develop a Cold Call Phone Script

Develop a cold call phone script utilizing the assistance prompts below to build your script one component at a time.

Defined goal____

____

Create interest____

____

____

Be direct and brief

Place yourself at their level_____________________________

____

____

Be confident in experience and product/service______________

____

____

____

What value will you offer to the conversation?______________

____

____

____

Ask for the appointment (close for the attainment of the goal)______

____

____

____

Needs & Decision Criteria

"We need a hit, so here I go." – Joe DiMaggio

Once you understand why and how a person makes a purchasing decision, you can better understand how to position and sell.

Why do people buy? Because They Have Needs

At a basic level, people buy for only two reasons, to avoid pain or to increase happiness. However, the reasons for making a purchase do not necessarily make the decision process any easier.

A customer's need can be defined as "the pain that the customer is trying to cure." When a customer has a problem they will seek a solution. The defined need must be fully understood before a salesperson can prescribe a solution. In the Buyer process, a prospect will begin by defining their need based on a problem they are currently experiencing and what they see as being the potential solution to that problem.

How do people decide? By Ranking Their Decision Criteria

Once a customer's needs have been uncovered and fully defined, the successful salesperson will question to understand their decision criteria. What will the customer use to make their final decision? Are they strictly price driven? Will the quality of the product be important? Is service after the sale important? Every customer will place a different value on the criteria and as a result, every customer may come to different conclusions for their product or service of choice.

As a salesperson, it is important for you to understand how your products or services can address each of your customers' decision criteria. If you are not well positioned against your competition on a particular criterion, it will be important in directing your selling strategy. The following are examples of a customer's decision criteria.

Quality	Brand name, perceived quality based on higher price, place of purchase.
Price	Is it within your budget? Is the price fair?
Support	Does it have a warranty? Is support service local?
Features	Does it have the features you require?
Delivery	Does it have to be ordered and shipped?

Exercise: Rank Decision Criteria

In your group, identify the top five decision criteria you would use purchasing a new car.

Identify the decision criteria your customers may use when selecting who they will purchase from.

Product or Service: New Car

Ranked Decision Criteria:

1. ______
2. ______
3. ______
4. ______
5. ______
6. ______
7. ______

Product or Service: Blueprint reproduction

Potential Decision Criteria:

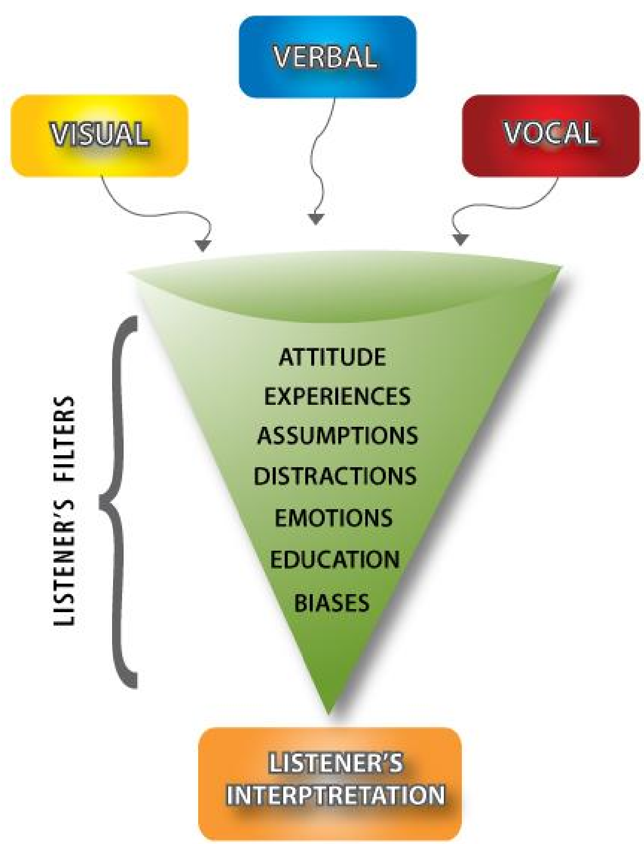
Communication Elements

"There are no facts, only interpretations." - Friedrich Nietzsche

Communication filters emphasize the skill of listening and how it relates to verbalizing information, feedback, and feeling. While listening may not be the only ingredient in the formula for good communication, it does play a vital role. As we listen to information from the speaker, it passes through several filters before the listener's interpretation is determined. When we understand this funnel, we can rely on it to:

- Find out where we are in a complicated interchange of ideas and opinions
- Evaluate the way others respond to us
- Learn how to handle those responses, even if they are unexpected or unwanted
- Examine alternatives for changes of direction without necessarily sacrificing our goal in the interaction

In all our communication, it helps to have a mental picture of what we are doing, where we want to go, and what we must do to get there. The communication funnel answers this need, by helping us design a strategy for our communications with others. A model of the Communication Filters is shown below.



What should I listen for?

In many cases a salesperson listens actively and captures effective notes only to find out later that they failed to ask an obvious question when they are confronted on the situation with their manager. While it has already been stated that a salesperson should be listening for a customer's Needs and their Decision Criteria, they should also be listening for additional opportunities or show-stopping road blocks. These can be referred to as Green Flags and Red Flags.

Red Flag

Any information that could potentially slow down an opportunity or even end it is considered a Red Flag. When a salesperson hears a red flag it should be duly noted in their notes, but it does not have to end the conversation. In most cases it will be necessary to explore the requirement further, but not necessarily at that moment.

Example Red Flags

If you do not have delivery capabilities overseas, the following would be an example of a red flag:

"We have to jump when our customers ask us. We will definitely want the ability to communicate with you when needed. That is why we are looking for providers that run 24 x 7 production."

Green Flag

Any information shared in a conversation that sounds like it could potentially lead to a new sales opportunity is considered a green flag. As simple as this sounds, it is an acquired skill. Constantly thinking creatively during a conversation can lead to these additional opportunities.

Example Green Flag

If you are currently working on an opportunity to provide leased office equipment two new field offices on North Lamar and on Metric Blvd, the following statement from the customer mentioning another location on Lakeline Blvd could be a green flag:

"Is that all? I think so… let me see, that is the copier for North Lamar… the copier and printer for Metric… Lakeline Blvd… no, we're not doing that one… Yes, that is all. Those two locations need to be set up just like our Round Rock location we have with you today."

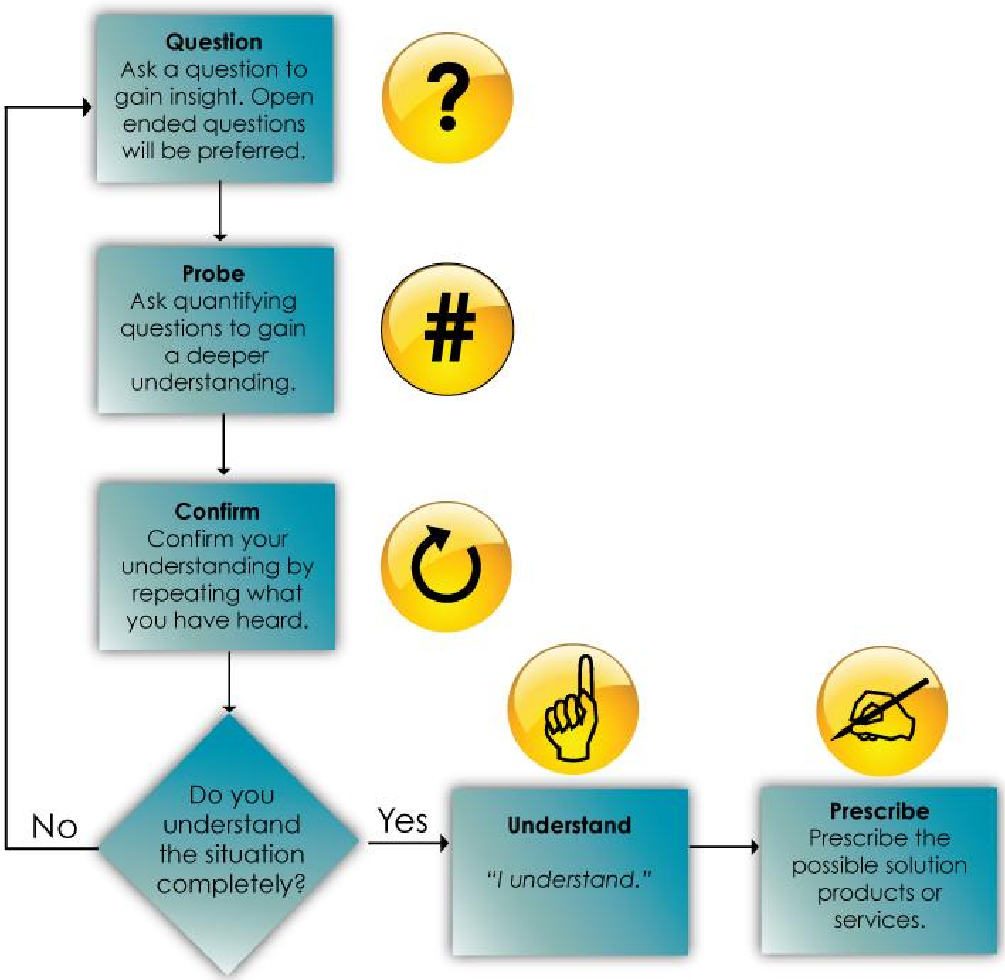
Questioning to Diagnose

"Questioning is the door of knowledge." – Old Irish Saying

Have you ever walked into a doctor's office and been handed a prescription after she has only taken your temperature by placing her hand on you forehead? What kind of diagnosis is that? Would you feel adequately diagnosed? Or would you rather have the doctor take the time to ask you questions and run a series of tests before jumping to a conclusion? How much credibility would a doctor have with you if they diagnosed by touching your forehead as the examination?

Just as a doctor diagnoses and prescribes for a patient, so we as customer care professionals must diagnose and prescribe solutions for our customers. This is your job as a professional. It is not our job to make assumptions or respond by taking orders. In today's environment, we are expected to be experts in our industry, highly trained individuals capable of delivering solutions to problems.

The Examination Process for a salesperson consists of fives steps. The first three of these steps are repeated as many times as necessary to obtain the appropriate information and understanding for prescribing a solution. The fives steps of the Examination Process are defined shown below in the process diagram.



Discovery Conversations

"Learn from yesterday, live for today, hope for tomorrow. The important thing is to not stop questioning." – Albert Einstein

Understanding the types of questions and the basic process for questioning, the next step is to synthesize all of these components into an actual conversation. What does a conversation using these elements actually look like? How would it sound when all of these pieces come together into a meaningful dialogue with a customer?

A conversation built around questioning can be structured into three key focus areas; Business, Needs and Decision Criteria.

Business Questions

After the cordial remarks have been made and the business portion of the conversation begins, a discovery conversation should begin with an understanding of the business. If this is a larger organization that can be found on many online information sites, the basic questions should already be answered for you (Where is headquarters? How many employees do you have? Etc.) The more specific questions you will most likely not have answers to and they must be asked.

- *How is your company structured by geography and function?*
- *Which groups will have an ownership stake in this project?*
- *Who will be involved in the decision process for this project?*
- *Can you tell me about your current communications environment?*

Needs Questions

Understanding what a customer needs is so much more than asking a simple question like, "what do you need?" That would be like you visiting the doctor and as soon as the doctor enters the room they simply ask, "What do you need?" How should we know, they're the doctor! In addition, we don't want a doctor to jump straight to the prescription either. We want a solid diagnosis prior to prescribing anything. That is the role of the professional salesperson. Ask all the right "needs questions" to perform a proper diagnosis before prescribing. Focus these questions on their goals for the project and business. Do not just ask them what they'd like to order!

- *Tell me more about the project you are working on?*
- *What are the goals of this project?*
- *How do you see this project helping your organization?*
- *Can you describe for me the ideal "end state" after this project is completed?*
- *Which of your business units will be affected by this project?*

Meeting Agendas

"Pretend that every single person you meet has a sign around his or her neck that says, 'Make me feel important'." – Mary Kay Ash

In preparation for face-to-face meetings, a meeting agenda should be created. Often times it is appropriate to email this agenda prior to the meeting so that all attendees are prepared and aware of the topics of discussion, as well as the objectives for the meeting. Your agenda shows your attendees that you are professional and serious about accomplishing your objectives. The agenda should include the topics of discussion, time limits on each section and the objective or goal for the meeting.

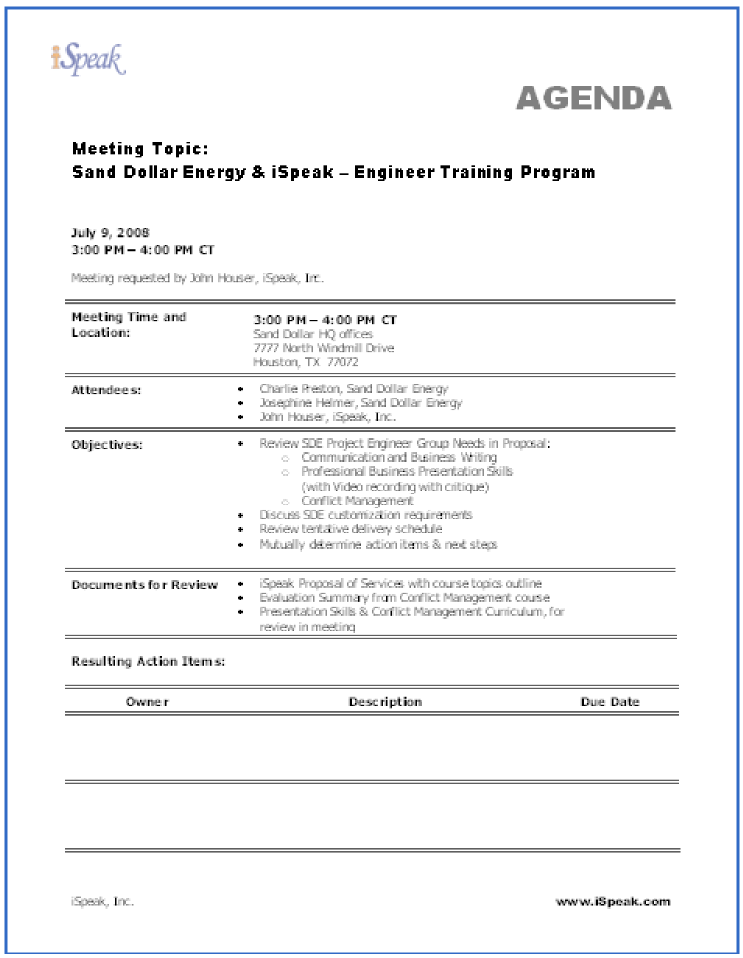
Agendas do not have to be formal, they need to be objective and functional. Creating agendas with today's technology can be done quickly with templates and tools that are available in popular word processing applications.

Functional agendas should contain the following elements:

- Meeting Topic and description
- Start and Stop time and date
- List of attendees
- Objectives for the meeting

Depending on the phase of the sales process, the agenda components may differ. For a meeting in the **Presenting Phase**, essential elements should include a discussion around the following topics:

- Product
- Price
- Company
- Support



iSpeak

AGENDA

Meeting Topic:
Sand Dollar Energy & iSpeak – Engineer Training Program

July 9, 2008
3:00 PM – 4:00 PM CT

Meeting requested by John Houser, iSpeak, Inc.

Meeting Time and Location:	**3:00 PM – 4:00 PM CT** Sand Dollar HQ offices 7777 North Windmill Drive Houston, TX 77072
Attendees:	• Charlie Preston, Sand Dollar Energy • Josephine Helmer, Sand Dollar Energy • John Houser, iSpeak, Inc.

Objectives:	• Review SDE Project Engineer Group Needs in Proposal:
	  ○ Communication and Business Writing
	  ○ Professional Business Presentation Skills (with Video recording with critique)
	  ○ Conflict Management
	• Discuss SDE customization requirements
	• Review tentative delivery schedule
	• Mutually determine action items & next steps

Documents for Review	• iSpeak Proposal of Services with course topics outline • Evaluation Summary from Conflict Management course • Presentation Skills & Conflict Management Curriculum, for review in meeting

Resulting Action Items:

Owner	Description	Due Date

iSpeak, Inc. **www.iSpeak.com**

Perceptions

"Every encounter with a customer is a Moment of Truth - an opportunity to form a positive impression that favorably affects your customer's loyalty, retention, and referrals."
– Jan Carlzon

In sales, successful Account Managers empathize with their customers and focus on their perceptions. It can be said that in sales perception is reality. If your company has the highest quality rating from JD Power and Associates, but your customer does not know that, they may have a negative perception of your organization, especially if that person just heard about one bad experience from a colleague.

Perceptions must be uncovered and then brought into alignment with high quality that you truly deliver. Managing customer perceptions can be done through a non-confrontational presentation of the facts. Often time's perceptions are weak because a customer is left alone to develop their own opinions with no assistance from you. Communicating your message on a regular basis will help to align their perceptions with reality.

- Check the customer's feedback on a regular basis
- Utilize regular communications and presentation of factual data to maintain alignment
- Do not use negative comments to taint the perception of your competition

Developing Credibility & Rapport

Many sales have been lost due to a customer not being able to trust the individual. A level of trust must be established for a prospect to get beyond their risk assessment phase of the buyer cycle.

Credibility can be established through our personal presentation, vocabulary and knowledge. It can also be inferred through your association with a quality organization or from a referral. The credibility that you establish should be protected at all costs. It will lay the foundation for building rapport as the relationship continues. Methods for earning your credibility include the following:

- ____
- ____
- ____
- ____
- ____
- ____
- ____

Remembering Names

"I call everyone 'Darling' because I can't remember their names."
- Zsa Zsa Gabor

Learning people's names can be difficult for many people and forgetting them can sometimes lead to awkward situations. When you can remember someone's name, it establishes a foundation of trust and respect. As pointed out in multiple studies, and by Dale Carnegie in *How to Win Friends and Influence People*, a person's name is to them, the sweetest and most important sound in any language.

What better way to communicate and develop rapport than with speaking someone's name! And yet, knowing that speaking someone's name is one of the best methods for establishing rapport and then actually *doing it* are two different stories. Why is it that the majority of people you meet will tell you, "Oh, I can't remember names. I'm horrible at that."

The answer is that it does require a level of effort and most individuals are unwilling to make the commitment to improve their abilities at remembering names. It sounds simple, "Remember people's names." But based on that argument, you could say that exercise also sounds simple, "Exercise at least 3 times a week." We know that we should and it sounds like a simple solution, but we are often times unwilling to make the commitment required to improve.

The First Step

So what is the first step to remembering names? Do not give yourself permission to forget! By telling yourself "I'm horrible at remembering names" you are actually giving your brain permission to be lazy. You have just told your brain… "You know what brain; we're never going to remember all these names. Why don't you take a nap until you're needed because we really don't need to listen to these greetings."

Exercise: Remembering Names

Below are a more techniques to help you remember names:

- Start with the right ____________________.
- Actively ____________________ when the other person states their name.
- ____________________ their name out loud.
- ____________________ their name, when possible.
- Connect or associate their name with ________________________________.

Effectively Using Body Language

"I speak two languages, Body and English." - Mae West

Your body language is the most important communication factor when communicating face-to-face with customers. You can use your stance, posture, facial expressions, hand gestures and other movements to your advantage. According to Dr. Mehrabian, 55% of your communication is represented visually with your body language. If your body and verbal contradict, your listener will believe your body language over the words you use.

The most important aspect of body language is your ________________________

You want to have a warm, sincere smile on your face when you answer the phone; it will come through in the tone of your voice. You will not get enthusiasm from people unless you initially give enthusiasm to them. You cannot receive a smile unless you give a smile first. In Dale Carnegie's book, *How to Win Friends and Influence People*, he describes this inexpensive and often overlooked 'gift' that you can give your customer when he says, "It costs nothing, but creates much."

> In her 1991 book, *The Visual Dictionary of the Human Body,* Dorling Kindersley found that it takes 72 muscles to frown and only 14 to smile.

Eye Contact and the Silent Nod

Other powerful elements of body language include eye contact and the silent nod. Often, the nod of your head will accompany eye contact. Eye contact also serves as a means of feedback for the speaker. When you look at someone for a few seconds while you are speaking, most people will instinctively nod, signaling they are listening to you and possibly that they agree with you. A nod indicates you have made contact and are getting through. You can also use a nod as part of your body language to acknowledge people when they are speaking.

Over the phone, you can use the following as a replacement for eye contact and the silent nod. With these responses you must vary the way you respond, speak softly and natural, and at the right time.

- ________________________________
- ________________________________
- ________________________________

Body Position

Your body position is another critical factor in making a great first impression and communicating with your customer. You can communicate sincerity and attention by using an open stance that is demonstrated by looking up, chest out and feet slightly apart. Combine this with a forward lean and palms facing towards your customer. An open stance is welcoming and conveys trust and acceptance and is characterized by outstretched arms or hands and feet slightly apart. On the other hand, a closed stance conveys resistance, lack of acceptance and even hostility and is characterized by folded arms and looking down at the floor or away.

Try to use gestures that come naturally. You should not stand rigid and motionless - nor should you appear like a puppet on a string, making unnatural, false, exaggerated or jerky gestures. Some communicators unconsciously make the same gesture over and over, creating a distraction, and ultimately detracting from the message you want to deliver. The types of body positions you want to avoid include:

- ____
- ____
- ____
- ____

Reading Body Language

Just as portraying the proper body position is important; you can also read your customer's body language and nonverbal signals. There is a lot of information we can learn from a person's posture, expressions, gestures, and mannerisms.

Non-verbal Communication	Interpretation
Facial Expressions	
Smile	Friendliness, happiness
Raised eyebrows	Disbelief, amazement
Narrowed eyes	Anger
Body Postures	
Hands on hips	Anger, defensiveness
Shrugging shoulders	Indifference
Squared stance or shoulders	Problem-solving, concern, listening
Biting lip, shifting, jingling money	Nervousness
Sitting on edge of chair	Listening, great concern
Slouching in chair	Boredom, lack of interest
Eye Contact	
Glancing	Lack of interest
Steady	Active listening, interest
Hand/Arm Gestures	
Pointing finger	Authority, displeasure, lecturing
Folded arms	Not open to change, preparing to speak

Responding to Tough Questions

"I wish I had an answer to that because I'm tired of answering that question." – Yogi Berra

The goal in responding to tough questions is to literally disarm the person asking the question by uncovering the true intent behind asking the question. Behind every tough question is a reason for asking it. People do not ask questions just to waste time, there is a reason.

If that reason can be uncovered, the response from the salesperson can be targeted directly at the cause and at the same time be much more effective. When all questions are seen in this light, the tough questions no longer seem hostile or negative. Some reasons for a prospect to ask tough questions include the following:

- The customer is testing the salesperson's knowledge
- The customer is questioning a differentiator between you and your competition
- The area of concern is a major issue for the prospective customer
- The explanation given thus far is confusing and should be clarified
- Your presentation is too focused on the features of a product

When the salesperson views the tough question as a request for more information as opposed to a hostile attack, it can assist the salesperson in maintaining their composure as they respond. Responses to these tough questions will involve the salesperson asking the prospect for the answer. By following this process, the prospect may answer their own question.

Examples of tough questions

- "Why are you guys so expensive?"
- "Why should I use a vendor that is more than 30 miles from my office?"
- "Why is your pricing so much higher than the other quotes I've gotten?"
- "Will you buy out my current IKON lease if I want to switch to you?"
- "You guys are not a 24 by 7 shop, like Kinko's. What if I have a late night need?"

Question ____

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Response ____

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Question ____

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Response ____

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Question ____

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Response ____

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Selling Tip

Address expected objections in your presentation before they are even brought up. This form of "beating the prospect to the punch" can defuse a situation before it ever arises.

Exercise: Proposal Presentation ISE

Utilizing the information you gathered in the previous meeting, deliver the group presentation for your proposed solution, answer difficult questions, overcome any objections and close for the business.

Needs uncovered in previous meetings:

____

____

____

____

Decision criteria for selecting a provider:

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Solution you will be proposing:______________________________

____

Strongest objections or questions you expect and your responses:______________________________

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Exercise: Interactive Situational Exercise Review Questions

Answer the debrief questions below to reflect on what you learned in this exercise.

Questions

What does the salesperson do to direct the conversation?

What did the salesperson do to show they were listening to the customer?

What were some of the good questions the salesperson used in the conversation?

What types of changes will you implement the next time you present to a prospect?

Referrals

"In sales, a referral is the key to the door of resistance." - Bo Bennett, author

The most effective sales technique for acquiring new leads comes through referrals. There is no faster method for obtaining new business than by asking existing customers who are familiar and satisfied with the services you provide. Referrals increase the comfort level of potential customers because they are based on existing relationships. Referrals are valuable because they reduce the cost of selling.

> In his 1998 book "Customer Centered Selling", Robert Jolles wrote that the best source of leads for sales professionals at Xerox was referrals.

When to ask for a Referral

Before you can ask a current customer for a referral, they must be satisfied with the product or service they have received from your company, as well as the customer service after the sale. Customer loyalty is built by consistently meeting or beating expectations. Loyal customers are customers for life and also become walking billboards as they continue to "sell" for your organization. Once you know your customer is happy, you can ask for a referral during a follow-up meeting or phone conversation.

How to ask for a Referral

Obviously, the more referrals you acquire, the more sales you will close. Referrals are like prospecting, the key to success is quantity and consistency.

Ask The first technique is the direct approach, which involves asking your customers for referrals after the iSpeak Sales Model has been implemented.

Give One of the best techniques for getting referrals is to give referrals. When you let your customers know you value and respect their business by giving them a referral, they naturally want to help you by giving referrals for your business.

Sample Referral

"Our business is largely built on referrals. If you feel that our service would be a good fit for someone else in your organization or someone at another company, I would greatly appreciate you passing along my name and contact information."

Thank You for a Referral

Always write a handwritten thank you note to the person who provided the referral. The letter shows your appreciation for the sales lead and also allows for you to ask for assistance again in the future.

Meeting purpose and objectives

What are the objectives for the meeting?
What is the customer expecting as an outcome?
What do you want to accomplish in this meeting?

Value you and your team will deliver

What value are you and your team bringing to this meeting (information, insights, designs, etc)
Were there any deliverables promised to the customer during a previous meeting?

Specific action you want the customer to take after this meeting

Internal referral or support on a current proposal?
An introduction to someone else?
Approval on a contract or proposal?