

How to Plan Effective Sales Calls

Some organisations use complex planning tools and in the process lose sight of what needs to be achieved. It becomes more of a management tool than a sales tool. Planning a sales call in reality is quite simple.

Sales call objectives

Begin by setting sales call objectives prior to the sales call. Then visualize what the successful outcome will look and feel like. This will help your mind to **focus on what needs to be achieved**. This can also impact on:

- Boosting self confidence
- Impact on personal feelings
- Improved self-management
- How the client treats you
- The number of increased sales.

Having set the sales call objective/s prior to the meeting will help to evaluate the success or failure on completion of the meeting. It is a great learning experience.

A sales call objective/s need to meet the following criteria:

1) Purpose

The purpose is why and what needs to be achieved during the sales call.

2) Progress

The sales opportunity needs to move forward in a definable way. Is it a step closer to confirmation?

3) Result

The outcome needs to be measured in a definable and quantifiable way. For example: *'To get an agreement for the next meeting with all stakeholders.'*

Setting sales call objectives

Sales call objectives need to be set for prospective and existing clients.

Prospective client:

A common mistake is to set a sales call objective that is too broad or vague. For example, *'To see how they are going.'* This doesn't meet the criteria for setting a sales call objective. It is of no value. To be specific is: *'Identify who is involved in the decision process.'*

Client:

By looking through a client's sales history possible ordering patterns, product preferences or personal information can be uncovered. This information can assist in setting the sales call objective/s.

The number of sales call objectives per contact is 1 to a maximum of 3. If too many are set then the prime objective needs to be identified and the number reduced accordingly.

Setting sales call objectives appears easy but requires self-discipline and to be effective needs to meet the 3 criteria of purpose, progress and result.



For more information or if you want to discuss a sales or sales management issue then contact Kurt Newman on +61 412 252 236 or email kurt@salesconsultants.com.au.



Kurt's expertise is in improving the sales effectiveness of his clients' businesses by generating more sales and in a more profitable manner. He has guided companies to increase sales from 10-56%. Clients range from small to multinational companies and he has completed projects in Australia, the Middle East, Asia and Europe.



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