

The Advantage of Pre-Call Planning

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By: Todd Fischer, Area Vice President

I know what you are thinking, “Oh great, another article on Sales 101.”

Be as that may, I see a lot of sales professionals forgetting the importance of preparing for a sales call. In my opinion, pre-call planning is one of the forgotten keys to success.

We all live busy lives, but taking a few minutes before each call to prepare will likely increase the chances for success, especially as getting in front of prospects continues to get more difficult. You really only have that one shot to make an impression and advance the sale.

Top performers take the time to research and prepare for meetings. They make sure the call is productive and brings value to the prospect.

To ensure a better outcome to your meetings, here are a few tips for pre-call planning:

1. **Do your homework first.** It sounds simple, and it is, but most of the time it's overlooked or dropped from the to-do list because of time restraints. It's so important to take a few minutes and research your prospect. Don't waste their time by making them tell you what they do. My favorite tactic is reviewing the company's mission statement before every meeting. If you can somehow align the company's mission statement with the prospect's needs and values, you'll come off much more professional and credible.
2. **Have your questions thought out and ready to go.** Well thought-out questions uncover needs, and if you really want to brush up, I recommend reading “Spin Selling,” by Neil Rackham. His writing focuses on “Consultative Selling” and the four types of questions to uncover needs.
3. **Be prepared to talk shop.** Prospects do business with instill confidence, and will do business with you when you show competence and the ability to help them achieve their goal. Industry knowledge is powerful and can be used to differentiate you from competition. Be wise and keep up with trends and key words to demonstrate industry awareness.
4. **Practice your sales tools and review brochures you plan to use.** Make sure your sales tools and brochures are up to date with current, relevant facts. Effective use of sales tools builds instant credibility and demonstrates sales maturity. If you don't have the sales tools you need, or if the tool or brochure you plan to use is out of date, contact your AVP.
5. **Establish your desired outcome.** The obvious goal for every meeting is to move on to the next stage of the sales process, but there are several little things we need to accomplish during each phase of the sales process that contributes heavily to winning a sale. Don't just wing it before each meeting and hope for the best – take a few minutes to establish your meeting expectations, have them in view during your meeting and refer back to them if needed. There's nothing better than walking away from a meeting knowing you've accomplished what you set out to do.

As you begin to incorporate pre-planning into your everyday routine, you'll quickly find your meetings will become more productive. You will come off more professional in front of your clients and sense an inner feeling of self-satisfaction. In the end, you may look back and wonder why you never did this before, or how you got away from it.

After all it's simple, doesn't take much time, and it's proven to improve overall success.

