



Developing People > Advancing Business



*Thoughts about selling from one of the
world's most successful salespeople*

PRE-PLANNING YOUR SALES CALLS

WHITE PAPER

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Pre-Planning Your Sales Calls

Consider these scenes of a salesperson in action:

Scene I. A Production Manager's Office

MANAGER: The idea seems good, but it won't be easy to incorporate it in our system. Do you have any sample drawings?

SALES REP (*delving into his bag*): Yes, of course. Here it is—no, it isn't — ah, this is the one (*taking a crumpled piece of paper out of his bag*). Sorry, that's a drawing of the larger unit. (*He rummages again, muttering.*) I know it's here somewhere — I was only using it an hour ago. Ah, this should be it ...

Couldn't happen? Doesn't happen? Actually, it occurs over and over again.

Pre-planning involves a lot of things. It also means that every sample — every sales aid and every brochure — must be packed so neatly that a salesperson can extract any piece required without taking his or her eyes away from the customer.

Scene II. A Receptionist's Office

RECEPTIONIST: May I help you?

SALESMAN: I want to see the person who handles office supplies purchases.

RECEPTIONIST: We have several executives—each purchases for their own department.

SALESMAN: Well, I want the one who buys computers.

RECEPTIONIST: That would be our general manager. I'm sorry, he only sees representatives by appointment.

SALESMAN: O.K., I'll write then.

Couldn't happen? It did — to us.

Pre-planning includes finding out the name of the correct buyer before the call.

Scene III. A Retail Shop

SALESPERSON: Good morning, Miss Jones. I just got a repeat order for the twin-beds that have been selling so

well. I persuaded Mr Smith to put in an extra light blue — it's the new color. They should go well, don't you think?

Miss Jones looks annoyed and turns away without saying anything. Later:

SALESPERSON: What's the matter with Miss Jones this morning?

SECOND ASSISTANT: You called her Miss Jones. She told you last time you were here that she's Mrs Jones — and she also told you that the new light blue shade doesn't sell well.

Pre-planning means using a card-index system. Sales representatives for consumer goods are so sure they know everything about their regular customers that they feel there is no need to keep such records. But salespeople often make mistakes — especially in human relations — because they don't have perfect memories. The help that can be given by an assistant like Mrs Jones is a good example of this. Buyers always listen to members of their staff. Managing directors are swayed by their assistants, and works managers by shop staff. Up-to-date records should be kept with the names of assistants, their special preferences, whether they are married or single, when they take holidays, and so on.

Scene IV. An Accountant's Office

SALESPERSON: Good morning, Mr Smith, I wanted to talk to you about the inquiry you sent us.

ACCOUNTANT: I've told you several times not to call on Mondays — it is most inconvenient. You should have telephoned for an appointment.

Pre-planning means finding the best time to call. This may not apply to speciality sales representatives or people selling consumer goods, but it does apply to most representatives selling capital equipment.

Scene V. A Bar

SALESPERSON: The Green Bay Packers are in great form — they'll walk all over the Bears on Saturday.

Bar Manager: Now that's where you're wrong. You don't know what football's about. As a person who was born in Chicago, I've followed the Bears for

Pre-planning means learning something of a prospect's background. The salesperson deduced that the bar manager must be a Packer's fan because his premises were in Wisconsin. If the sales person was not sure of the facts, he or she should have avoided discussing football.

Scene VI. An Office

SALES REPRESENTATIVE: Well, that's the whole proposition. I'm glad you are so interested, and I'm sure you'd like to tie everything up now. I'll just write down the details

OFFICE MANAGER: No, don't do that! I'm sorry but I'm not in a position to buy. You'll have to see our general manager.

Pre-planning means finding out as much as possible about a company's personnel and the authority of each executive to place orders. Is the company a corporation company, or is it a partnership? If the latter, does one partner have the right to buy without consulting the other? If a manufacturer, do they make quality or cheap products? How many employees? What is the firm's credit rating?

The more information a salesperson can gather, the more success there will be to turn a prospect into a customer.

OBTAINING INFORMATION

There is a mine of information awaiting the salesperson who will take the trouble to dig for it.

Head Office

What do most sales executives know of their customers? Sometimes they have a great deal of information, but they do not give it to their representatives without being asked. So, ask!

Local Salespeople

The speciality salesperson making from ten to twenty calls a day cannot check prospective customers with head office. But local traders will often talk about their neighbors. Even if salespeople are unsuccessful at specific calls, they can still ask for information. They could say:

'Can you tell me the name of the owner of the butcher shop across from you?'

'How long has he been there?'

'What kind of a person is he?'

'Does he have a partner?'

The answers will help ease the approach to that butcher.

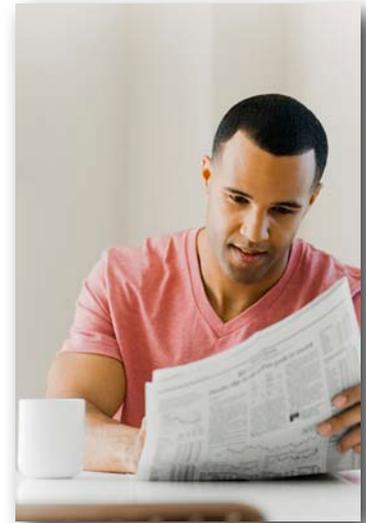
Newspapers and the Internet

Salespeople should read more newspapers and spend more time on the Internet. Representatives selling high-priced equipment should read a business newspaper or search sites on the Internet that deal with large businesses. They will learn of new developments, of the background of top executives, and new plans for expansion. In company reports, salespeople can find further information to help talk in terms of the customer's interests.

Salespeople selling to smaller local organizations should get local newspapers. There may be nothing useful in them for twenty-five weeks out of twenty-six, but on the twenty-sixth week there may be something that will indicate a sales opportunity at a local factory or Local Government office.

A business owner is always pleased when a representative mentions seeing the store advertisement in the *local paper*, or what the editor of the *Home Town News* wrote of the shop's special window display, or a reference to the shopkeeper's speech at the opening of an old people's home or the local Rotary Club.

Some salespeople do better than others because they take their jobs more seriously. It is time-consuming to read local newspapers, but such time spent in preparation for an order is always worthwhile.



Trade magazines can also keep salespeople up to date in many aspects of their job. Publicly traded companies increase in size, with Editors or T.V. Reporters ready to pounce at the least sign of inefficiency or a fall in profits. The people who get to the top give that little bit extra — extra study of a project, extra homework, extra thought to a sales drive, extra care with a new production program, extra courage, extra effort to sell abroad, and so on. Most people don't want to sacrifice their time to 'extras'. They want success without that extra effort.

Web sites

Details of web sites with up-to-date information about companies and company directors are available for almost every organization today. No sales person could be expected to accumulate all this information by him or herself. But they are all readily available on the Internet. On web sites, you can find?

- names of directors of companies
- scholastic background of directors
- names and addresses of companies within a group
- products manufactured or sold by a division of an organization
- capital structure
- number of employees
- listen in on recorded reports to stakeholders, typically given by the CEO



Observation

Good observation plays a part in pre-planning. A change of name over a shop front, or a good window display, can help a salesperson surmount the first hurdle of the approach. The store buyer's preferences

may be seen in the range of goods in the windows. It might be too late to obtain a contract when it is seen that a site is being leveled for a new building, but there could still be opportunities with the building director or developer.

The salesman can learn something from the type of cars parked outside an office or shop, from the decor of a waiting-room, from the letter-heading of a company's note paper, from advertising campaigns, from the general staff atmosphere.

Other Sales Representatives

Sales people are, by nature, talkative. Analytical chemists or accountants do not talk a great deal about their work, but salespeople are always ready to describe victories or defeats. Listeners, we know, can always learn something and other salespeople can be surprisingly helpful. Many a useful hint has been picked up from their idle chatter at the end of the day.

Salespeople will refer to the peculiarities of customers, the ease with which a receptionist can be out-manuevered, the new machinery being installed in a certain factory, a new shop being opened ...

No ethical salesperson should get information from a competitor who might be ignorant of the reason they are being asked, but representatives selling non-competitive goods have much to teach. A salesperson selling office machinery may have noticed that new partitioning is needed. A book sales rep may know of a new store's department for cosmetics.

Make friends with other salespeople — they can be good friends to you.

The Pre-Planning Data Sheet

Your pre-planning inquiries should be recorded on some type of portable card, a data sheet, or on your computer in your Customer Relationship Management (CRM) system. For instance, a salesperson of high tech fire extinguishers and fire detecting systems may assemble all the facts likely to help at a factory. The information captured about the client could include:

Company Name: Halls Draperies

Address: 9735 Spring Valley Drive;
Ontario, California 91710

Telephone No: 909 872 4335

Associate Cos: Thompson Drapes, Costco, Loewe's

Authority to Buy: Under \$25,000 any departmental manager; over \$25,000 the general manager, Fred James must approve

Influence to buy: Production manager, R. J. Liang

Employees: 300 at the main factory

Present system: Sewing machines installed about 12 years ago. Cannot find out name of original manufacturer. It seems that service is given irregularly.

Fire hazards: The usual, but special risk in the warehouse, where employees are not stopped from smoking. Cigarette butts are seen on the floor. They no doubt are aware of a recent fire at another warehouse nearby.

Buying authority: Fred James, Chairman of local Republican party. Played baseball for local team. Has son in business in Accounts Dept. (Accounts Dept on top warehouse where there is a fire risk.)

Married, but now widower.
Self-made man and proud of it. Has been with Co. twenty years. Loyal. Thinks very little of salespeople. Likes facts. Member of local Methodist church.

Other details: Must see Man. Dir. but will first see Production manager and tell him of appointment with Man. Dir. Must get his interest in first place.

Must get large order or nothing. Co. hope to have IPO shortly.

What would happen if there were a fire before then?

Such a detailed sheet is worth while only when big business is sought. For \$100 or \$200 orders this intense

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study of a prospect and the business is hardly necessary.

The Planners

Salespeople can be placed roughly (very roughly) in three categories:

the meticulous planner

the constant planner

the semi-planner

Even the most unprofessional salespeople will do some pre-call planning, if it only involves giving thought to the name of the buyer or where the salesperson should park his or her car.

The *meticulous planner*, however, plans carefully each evening, first completing sales reports, then entering details on to the company's CRM system, or whatever system the salesperson has devised. Next, the sales person considers work for the following day — what time should be spent telephoning to get appointments? Or, if appointments are already made, how long should be spent with each buyer? What are their needs? And so on ...



The *constant planner* is nearly always an enthusiast, deeply concerned with every aspect of his job. Such a person is continually planning — thinking ahead. When the late Ian Fleming, author of the 007 James Bond series, was asked, 'When do you plan the writing of a book?' he answered, 'All the time!' This statement is true of most authors. They are always delving into their minds to solve problems, to think of improvements for the next chapter or next book, to re-plan a chapter already written, to consider the best approach to a publisher, to consider film rights ...

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These thoughts pass through their minds while driving, taking the dog for a walk, pretending to listen to the gossip of colleagues, or the small talk at cocktail parties ...

The author is no different from the salesperson who is a *constant planner* — except for report-writing, the latter does not necessarily set aside a special time for planning, because the constant sales planner is always planning -- always jotting down notes.

Unfortunately, many salespeople are *semi-planners*, believing they can *play it by ear*. They don't bother to keep a card-index system, or any type of system, relying on memory to bring back details of customers' requirements — names of decision influencers ...



An example of the difference between the *meticulous planner* and the *semi-planner* is that the first will always carry coins for parking meters or that a cell phone is fully charged. *Semi-planners* would never dream of checking whether they had change with them each morning, and sometimes has to make this excuse to a customer: "I'm so sorry I'm late, but my car broke down and my phone battery was dead." *Semi-planners are* muddlers, who only does well if they are outstandingly good at selling.

There are three stages in planning:

1. At regular intervals throughout a year
2. Once a week
3. Daily

PLANNING AT REGULAR INTERVALS THROUGHOUT THE YEAR

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Business is ever-changing. Facts — information — given to a salesperson are altered regularly. This necessitates a continuing reassessment of:

- product knowledge
- competitors and their products

Sales reps must also remind themselves of the special features of their products or services at least once a month. Familiarity with a product can lead to a mental blockage, or mental laziness. If these mental aberrations are not checked, orders can be lost.

A buyer might say:

"I didn't know you also supplied hoses — I've given the order to ... I wish you had told me you supply them as well."

Buyers often buy from competitors because they don't know the full extent of the range of equipment of a trusted and regular supplier. A buyer is also apt to forget special features, and unless reminded of them will say:

'I didn't know your units could be adapted to a central system — I thought you only made them for individual use. Unfortunately, I've already given the order to .. .'

If a salesperson doesn't remind him or herself constantly of those features which helped him to get the order initially he can lose repeat business. Reminders are an essential part of preparation.

WEEKLY PLANNING

A name sometimes given to weekly planning is *armchair planning*. This conjures up visions of the salesperson at home, seated in an armchair, the children having been warned off, deep in thought, drinking a cup of coffee, mind acutely alert. The weekly planner is thinking ahead, planning a close with a hot client ...

A very nice, comforting picture, but most salespeople would find it extremely difficult to arrange to have that kind of uninterrupted peace on a Saturday or Sunday. All *armchair planning* really means is taking 'time off' to deliberate and work out strategies for the week ahead. Maybe this does take place when the family has gone to bed, or before embarking on a Sunday outing. Somehow, time has to be found, unless

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you are a constant planner. But even the constant planner needs to set aside some time to consider more carefully the notes made during the week.

DAILY PLANNING

Although customer and prospect information needs to be checked at weekends, it is wiser to study each evening any information relevant to the following day's work. Daily planning is, in primarily a study of customers and prospect customers. The salesperson needs to be reminded:

1. What a company manufactures.
If any new products have been introduced.
If they have made known any future plans.
2. If anything has been sold to that company previously, in which case details should be available.
If there has been any complaint about the product or after sales service.
If they can be supplied. It is not unusual for a salesperson to take an order only to find that a stop has been put on that particular account. This could be because payments are in arrears, or more usually, because it has not been possible to get extra insurance cover for them against bad debts.
If the company are prospective customers, which products will primarily interest the buyer.
If there are any quotations outstanding, what competitors' products they are using.
3. Who has authority to buy.
Who could influence a buying decision.
4. Facts about a buyer — his or her interests.
5. Details of points discussed at a previous call.
6. Opportunities for future business.
7. Buyer's main needs.
8. The main objective of the call.
9. The secondary objective.

Demonstration Units and Sales Kits

Salespeople must plan the order in which they will demonstrate the use of their equipment or use of sales aids. Too often salespeople giving a demonstration says:

I'm sorry it's so dirty, but I only collected it late last night from ...

It isn't perfect, but it's the best I can get ...

It worked all right yesterday.

Do you have a screwdriver ...

These damned links have jammed ...

All equipment used for demonstration purposes must be checked over every evening, and possibly re-checked the following morning and checked again immediately after use. This is an essential part of planning. If a computer display projector is necessary, make sure that the customer has one you can use, or even better bring your own. Check to make sure there are no glitches with setting up and displaying your electronic presentation.

Never risk losing a buyer's confidence by demonstrating with equipment that could be faulty. Rather put off the demonstration until perfect units are available.

Similarly, a sales kit must be checked to be certain there are no dog-eared or stained leaflets, indecipherable drawings, or out-of-date figures.

Fashions in style change. Hair may be longer or shorter, pants wider or narrower, shirts spotted or striped, skirts shorter or longer, faces shaven or bearded; but a sales kit must *always* be the same — immaculate.



Sales literature and sales aids should always be placed in the briefcase in the same order. Documents can then be extracted in the best order without looking away from the buyer.

The objective of sales planning is to be prepared for every eventuality. Sales planning ensures that you give your buyer or prospective buyer the best possible service.

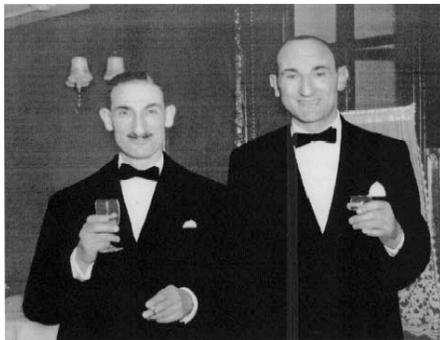
The salesperson who appreciates the value of pre-planning eliminates the need for guesswork, and lays the ground for success at each call.

* * * * *

Alfred Tack, a short biography...

Alfred Tack is the founder of TACK International Limited, a global supplier of sales and management training solutions. While the TACK consulting and course offering has developed over the years, its foundation rests firmly upon the brilliance of the this British business entrepreneur.

Working with his brother, George, an engineer, Alfred started his first business venture in the 1940s. Nu Aire, sold heating and ventilation equipment to commercial businesses.



The brothers achieved great success with NuAire through a large and highly professional sales team, each of whom was selected and trained by George and Alfred personally.

NuAires' amazing sales success created a demand from other businesses for the type of training that was taking place within NuAire. George and Alfred, natural

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entrepreneurs, quickly realized this was a business opportunity for them.

And so the first sales training began to be offered in 1948 in London at the TACK House. The commitment that the Tack brothers made to their students was "Learn it today — Use it tomorrow."



Alfred Tack began his career as an author in the 1950s,

writing books on selling, sales management, business management, leadership, and human relations. His books have been best sellers. He has also written murder mysteries and thrillers, two of which were filmed and one serialized for BBC radio.

Both brothers died in the early 1990s.

Today TACK International is a global organization, managed from head offices in the UK and Greece, with network operations in 47 countries and 25 languages. TACK has won several notable awards and accreditations.

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