



BizJudo

The Martial Art of Business

Build A Sales Call
Process That
Converts Prospects
To Customers



Build A Sales Call Process That Converts Prospects To Clients

Our greatest glory consists not in never failing, but in rising every time we fall. You progress not through what has been done, but reaching towards what has yet to be done. - Kahlil Gibran

This guide provides you with details regarding how to conduct that first sales presentation with a new prospect. I'm going to use a specific scenario as the example. However, the science behind the process works for all types of companies, regardless of whether you sell a product, service, or solution. It doesn't matter whether you're a solopreneur, small or large business, working out of your home or have your own facility with hundreds or thousands of employees.

Note: The example I use in this guide is for “consulting”. If you sell something other than consulting, not a problem, the concepts still apply. Follow the same formula and adjust for whatever you sell.

The size of your sale may dictate the size of your presentation. The higher the investment required by your prospect, the heavier the lifting your presentation needs to accomplish (which means it may be longer). If your sale price is smaller, and therefore perhaps easier for your prospect to make a decision, then you may want to size down the presentation as appropriate. If you're not sure, error on the size of more versus less, as long as value remains high. Cut out any useless slides that don't add value. Test and measure and continue to revise your presentation until you have maximized your conversation rates.

The science behind what I'm sharing with you in this guide is human in nature, people relating with people. Why a Power Point presentation? Because people comprehend information in different ways. Some are more visual than just auditory. You can cover both with a visual presentation that will help your prospects to better understand the value you are communicating.

Take what you learn here and make it your own for your specific situation. If you get stuck or have problems, feel free to reach out via my blog at www.BizJudo.com.

Structuring Your Sales Call

How does your sales call flow when speaking with your prospects? Do you start the call by reviewing all the features and benefits of the products/services/solutions that your company provides? If so, how is that working for you and are your conversion rates and revenue growth performing to goal?

Many sales calls start with the seller telling the prospect all about their company and why they are the greatest. The truth is, the prospect doesn't care. The prospect cares more about themselves and their own problems than how great you claim your product/service/solution might be. When they don't know you, they don't trust you. Therefore, it doesn't matter at that point in time whether or not you have the best solution on the planet. People need to trust you first. If you start the conversation with it being all about you and your company, there is a high probability that your prospect will get impatient and shut you down prematurely.

What I'm sharing with you is a sales call that flows according to [The Formula for Change](#). Always keep the end in mind. Meaning, what do you want to accomplish on this sales call and what do you want the prospect to do by the end of your time together? Like most prospects, they are probably skeptical and expecting you to be some pushy salesperson trying to sell them something they don't think they need.

Most prospects live in a state of denial of their current situation. They have told themselves everything is going to be alright and they don't need any help, especially not from you. Your job is to get them to lower their defenses, trust you, and take an open-minded look at the cold truth about their current situation. If you accomplish this, you have a greater probability of them being open to considering whatever you have that may help them overcome their challenges.

The Formula For Change

If you're not familiar with The Formula for Change, it was created in the 1960 by David Gleicher (while working with Arthur D. Little). It was refined in the 1980s by Kathie Dannemiller. We're going to focus on the Dannemiller version of the formula.

The Formula for Change: $D \times V \times F > R$

- D = Dissatisfaction
- V = Vision
- F = First Steps
- R = Resistance

I wrote a blog post explaining how this formula works and how I've tweaked it a bit for my own personal use and implementation. I'm not going to repeat this information since you can read that information [here](#). Instead, I'm going to share with you how I build the flow of a sales call.

For this example, I'm going to make the following assumptions:

- **Prospect**
 - Small Business Owner
- **Company Type**
 - Service Industry
- **Challenges**
 - Company is not performing as desired.
 - Customer complaints are on the rise.
 - Revenue growth is declining.
- **Situation**
 - The prospect responded to an email marketing campaign.

- The prospect was qualified via a brief call that confirmed some background information and the date/time of the call.
- The call is a 1-hour conference call via GoToMeeting.

- **Sales Call Preparation**
 - I've done some online research to learn as much as I can about the business and its owner.
 - I've customized a Power Point presentation that I already had prepared for this type of a sales call.
 - I've designed the presentation and discussion to follow [The Formula for Change](#).

- **Goals of the Call**
 - To get the prospect to lower their defenses, build some trust in me, and to open their mind to the possibilities that we will explore together.
 - To get the prospect to agree to move forward to the next step in the sales process.

- **Not the Goal of the Call**
 - The goal of this call is NOT to sell the prospect the final product/service/solution. That comes later in the sales process.
 - For this example, the sales process is designed to get onsite. Once onsite, then the next step is to sell the product/service/solution.
 - If you need to close the sale via the phone, you can still follow this process, however, the end of the call will need to be revised to fit your needs. I challenge you though, as to whether or not you need to go for the big close via the phone after a 1-hour call. Think through your strategy before making this decision.

Constructing Your Slide Deck

We'll now review the Power Point presentation flow and elements to drive the conversation to achieve the intended goals.

Slide 1: Opening Slide

- This is what is on the screen while you're waiting for them to get logged onto GoToMeeting and perhaps even waiting for other people they may have invited to be on the call with them.

- **Graphics** - Make a good 1st impression, as this is the first thing your prospect will see when they log onto GoToMeeting. This slide should include:
 - Colorful and pleasing design that uses your company branding.
 - A subject title that will resonate with the prospect and match their perception as to why they are having this conversation with you in the first place.
 - Your logo
 - Their logo – you can simply do a snippet from their website. Make sure it's not blurry.
 - Tag line and/or Mission Statement – whatever short and sweet message you want to drive home. They aren't going to remember everything you review with them on this call, so communicate something they can remember and speaks to your credibility in being able to solve their challenges.
 - Credibility message – If you have some sort of statistic as to your success rate, add it where appropriate.
 - Example: Small graphic that says, “100% Success Rate with XXX Clients”.

Slide 2: Agenda

- Once everyone is on the call and you have confirmed audio and visual is good, begin the call with review of the Agenda.

- **Introductions**
 - Have the prospect introduce themselves first. You're looking for:
 - Name
 - Title
 - Length of time with company
 - Background experience
 - Anything else they want to share they feel is pertinent for you to know about them.
 - If there is more than one person on the call, be sure to give everyone an opportunity to introduce themselves.
 - Introduce yourself
 - Name
 - Title
 - Length of time with company or in business for yourself
 - Any credentials (if applicable)
 - Personal – if they shared something personal with you during their introduction, feel free to reciprocate (if you're comfortable doing so).
 - A passion statement – communicate whatever your passion is that led you to do what you're doing.

- **Focus**

- State the focus of the call
 - This will help to remind the prospect as to why they are on the call.
 - You may be surprised how often people get on a call and forget why they scheduled the call in the first place.
 - This also helps with framing up the discussion and setting expectations from the start.
 - You want to make sure you handle any potential objections or questions you think they may have, right up front. Meaning, if you think they are going to be restless and just want you to get straight to the point of how much it's going to cost, then manage their expectations here. Get them to verbally agree to the flow of the call.
 - Ask them if there is anything else they would like to accomplish during the call. This will help you to determine if there are any other objectives your prospect has on their mind. You can then adjust your discussions as appropriate.

- **Time**

- Confirm how much time they have committed to the call.
 - You want to know upfront they are still committed to whatever timeframe was agreed to when the call was scheduled. If something came up that day and they know they have less time they are going to give you, this means you'll need to adjust the cadence of your sales call to make sure you still achieve the goal of the call.
 - Don't go over the time limit. Keep your commitment to the mutually agreed upon timeframe. If they are gabby and are burning your time, then do a time-check about 10-minutes before the scheduled end.

○

Slide 3: Current Situation – Raise Dissatisfaction (D)

- Have a slide that basically is to prompt the prospect to tell you their current situation.
- This is where you start to dig into the “D” in the Formula for Change to raise their level of dissatisfaction with their current state. You want to be very skillful in your questioning to peel back the onion and keep peeling until you get to the core root of the problem. You may not accomplish this on one slide, but by the end of the “Dissatisfaction” conversation, you should arrive at your targeted goal... the prospect asks you for your help.

Slide 4-X: Additional Current Situation (D)

- You may have additional slides where you want to break-out your focused questioning. For example, you might have additional slides to help with digging into metrics, excellence, best practices, etc.
 - Best Practices – this slide guides questions around best practices to see what your prospect is or is not doing.
 - Vision/Mission/Value – this slide guides questions around whether or not the prospect is living and breathing what they said their company is all about.
 - Industry Certifications/Designations – this slide guides questions around what the prospect should be doing to keep up with their competitors and driving excellence in their field.
 - Metrics – use this slide as the last in this section. It is great to raise the level of dissatisfaction to its peak. Ask questions around whatever metrics are appropriate for the prospects business and is related to how your products/services/solutions will help to impact these metrics. Use this information to build your business case.
 - Positive Financial Impact (PFI)/Return On Investment (ROI)

- At the end of the “D” section, have a slide that guides the conversation around PFI/ROI of their situation.
 - Question them about what the problem is costing them. They may not know, so you may need to pull information from them and do some ballpark calculations right on the call. If possible, use industry numbers to help you calculate the impact.
 - If appropriate, smoothly transition the conversation to whatever they may currently be paying or had paid in the past for a particular product/service/solution. If you can, get them to commit to providing some numbers. This will help you to gauge what they have paid to any potential competitors in the past.
 - If possible, calculate their potential Positive Financial Impact if they move forward with your product/service/solution.

Next Slide – Biggest Concerns (D)

- Have a slide to transition to the next part of your conversation.
- This slide sums up the dissatisfaction part of the conversation.
- Ask questions related to, “*What are your biggest concerns and what is the impact?*”
 - Get them to verbally tell you what they are most concerned about AND what the impact is to them and their business.
 - This is where you want their wound to be fully open and exposed. You want the pain level to be at its highest point.
 - You want the prospect to take ownership of their problems and not live in a state of denial.
- Do not move to the next slide unless you fully accomplish this step. If you do move forward without accomplishing your objective up to this point in the conversation, you will most likely be exposing yourself to the prospect making decisions based on price.

Next Slide – Company Overview – Paint Vision (V)

- This slide is where you put your company overview.
- You might want to also have your Mission/Vision statement on this slide as well.

Next Slide – Credibility (V)

- This slide is where you strut your stuff!
- Show the prospect how good you and your products/services/solutions are.
- Use numbers and percentages wherever possible. Example:
 - 100% Success Rate with over XXX Customers
 - 99.9% uptime guarantee
 - #1 Service Provider in the Tri-State area.
 - Team is fully certified and bonded.
 - Awards include...

Next Slide(s) – The Industry Challenges (V)

- Lay out the business case for why the industry is having similar challenges as your prospect is experiencing.
 - Show a list of challenges most people experience in the industry.
 - Show a list of the risk factors that must be considered due to these challenges.
- Make sure you are factual here and backup your information with 3rd party resources
 - Use published information from industry and/or reliable news resources and be sure to state where the information came from and when.

- Try to use as much current information as possible. The more dated the information, the less credible it will be perceived by your prospect.

Next Slide(s) – Share Your Why and How (V)

- Share the story with your prospect as to why and how you developed your process/product/service/solution.
- It's important for your prospect to know the background history that led to why you developed what you're about to share with them.
- If you think you're going to get any objections regarding your process/product/service/solution, you also want to deal with this objection before they actually object.
 - Telling the story as to the “why” will help you to overcome any process objections later in the presentation.
 - Telling the “how” will reinforce the value proposition that will help you to get over price objections later in the sales process.

Next Slide(s) – Positive Financial Impact (PFI) and Return On Investment (ROI) (V)

- Review PFI and ROI information.
- This helps to build the business case as to why the investment required is miniscule when compared to the PFI/ROI they will gain.
- If you have real examples from current or previous clients, use them as examples. Make sure you de-identify the information.

Next Slide(s) – Your Process/Product/Service/Solution (V)

- Now you're ready to share what you have to offer that is going to overcome your prospect's challenges.
- Take everything that you've learned up to this point about your prospect and their challenges and customize your discussion. You need to clearly express how you're going to overcome their challenges, fix their problems, and let them finally sleep well at night. In other words, paint the vision as to how tomorrow is going to be a much better day.
- Be clear and concise in how you explain everything.
- A confused mind says, "No!"
 - If you prospect cannot easily understand what you're explaining and how it will overcome their challenges and help them sleep better at night, they will most likely not buy. It's human nature for people to avoid things they aren't sure about. It could make the most sense in the world and have the best track record on the market, it will still be hard to sell if your prospect is confused.
 - Break it down into simple parts and processes if needed.
 - Don't just keep talking. As you explain, before you move from one slide to the next, ask your prospect if they have any questions.
- Temperature Check Your Prospect
 - As you go through your "V" slides, be sure to temperature check your prospect along the way. Especially if they make any comments, use that as an opportunity to ask a question to flush out their comment further. Use skillful questioning to see if what you're sharing is resonating with them.

- Assume the Sale
 - As you're going through this information, be sure to use language that assumes the sale.
 - Do this:
 - *When we work together, we're going to... blah, blah.*
 - *Once we schedule your install, you're going to be relieved because... blah, blah.*
 - Don't do this:
 - *If you decide to work with us... blah, blah.*
 - Instead – *Once we begin working together... blah, blah.*
 - *When we work with our clients, we usually... blah, blah.*
 - Instead – *When we work with you, we will... blah, blah.*
- Investment
 - At the end of the “V” discussion, go back to the PFI and Investment ballpark figures you shared earlier in the conversation. Here's where you want to see if they have overcome their earlier sticker shock (if any) and temperature check if the investment is going to be an issue for them.
 - If the prospect still has sticker shock or any investment concerns at all, go back and dig into their Biggest Concerns again. Tie your product/service/solution to how it's going to overcome their challenges and deliver the Positive Financial Impact you calculated together. Be sure to [guide them to sell themselves](#) on the ballpark investment, not you selling them.
 - Once you are comfortable they are ready to move to the next step in the process, then move to “First Steps”.

Next Slide(s) – Next Steps – First Steps (F)

- Don't ask, tell!
 - Don't ask you prospect what they want to do next, tell them exactly what is going to happen next. Say it with confidence and as if they have already made the decision to move forward.
 - If your prospect pushes back, then this means you missed the mark somewhere within the DxV part of the formula. You'll need to go back to the "D" part of the conversation and dig right back into their pain and the impact of that pain on them, their business, their family, etc. Use questions, not statements. Make them answer your questions out loud so it reminds them of that pain and reinforces them to take ownership of the pain and its consequences.

- Clearly lay out the next steps in your process and show a timeline of what is going to happen and when.
 - Do not get off the phone without having a commitment to the next step and the timeframe. If that means another call with them and/or other team members, then get confirmation of the timeframe of when that call will occur.
 - Sometimes you may have to coordinate the exact day/time with the Executive Assistant. However, at least get an idea of whether the next call is going to be tomorrow, next week, next month, etc?

- What's the next step in your sales process?
 - What happens next depends upon what your sales process looks like.
 - For large ticket sales, you want to only sell one link in the chain at a time. Meaning, this call may be one link that leads to the next link, which may be an onsite visit at the prospect's facility.

- If possible and if it makes sense for your business, I am very fond of conducting some type of a complimentary event at the prospect's facility. This gets you face-to-face and hopefully even a chance to meet their team (which could be major influencers in the decision-making process).
 - I would also suggest sending them some type of a confirmation after the call is over. Basically, confirming a summary of your discussion (following The Formula for Change). Keep it short and to the point. Be sure to confirm the next steps in the process that have been mutually agreed upon.
- Thank them for their time and let them know you are looking forward to speaking with them during the timeframe that was provided. Also, let them know you'll be sending them an email confirming your discussions and mutually agreed upon next steps.
 - If there were 1 or 2 other people on the call with your main prospect, say goodbye to them as well. Use their names.

Resource Slides

- When you start to develop your presentation, don't try to edit it at the same time. Just get everything out and start building your presentation. Once you have everything that you think is pertinent, then begin your editing process.
- When you start cutting out slides, you'll probably run into some slides where you're on the fence as to whether to cut them out or leave them in. Those slides can be pushed to the bottom in a "Resource" section. You would only go to them if you find you need them during a prospect call where a subject came up and you believe that slide would be beneficial in that specific part of the conversation.

I know this is a lot of information. I wanted to provide you with as much valuable information as possible in this guide. Rome wasn't built in a day, and you won't build this process overnight. Take your time and work on it one piece at a time. Pull together a good first draft and start using it in your prospect calls. See what worked and what could be improved upon. Tweak as you go.

If you follow this process, I'm extremely confident you will see a sharp increase in your conversion rates. If you currently do some type of onsite event with your prospects or plan on doing it after reading this guide, let me know if I can be of assistance. The complimentary onsite event has its own structure as well.

Support Options

If you have a question, feel free to contact me via my blog at www.BizJudo.com. If you feel you need further assistance, you can also review additional support options. Support includes:

- **Power Point Template** - Insert your information and you'll have a presentation ready for that first sales call with your prospects. Continue to refine as you learn more about what is working and what needs improvement.
- **Presentation Review** – Once you complete your 1st draft of your presentation, get valuable feedback prior to finalizing and using in front of your prospects.
- **Sales Call Feedback** – get valuable feedback from a live or recorded sales call with your prospect. This will help to shorten the number of prospects you are practicing on while you work on improving your presentation.

Now it's time to rebuild your sales presentation and start converting more prospects to customers. As you go live with prospect conversations, please share your experiences, I'd like to hear from you.

Take Action Today!

[BizJudo.com](http://www.BizJudo.com)