

Winning Sales & Service Strategies of Top Performers – The Critical Edge

By Barbara Sanfilippo, CSP, CPAE

ROMANO & SANFILIPPO LLC

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1. POSITION YOURSELF AS AN EXPERT TO ATTRACT WARM LEADS

Based on your current customers and local market opportunities, select "target" professions or niches (e.g.: architects, lawyers, CPAs). Clone your best clients!

Ask your clients, prospects and referral sources two key questions:

Name of client: _____

What professional industry association or community group do you belong to?

What magazines, newsletters or industry periodicals do you read?

Infiltrate your niche and build credibility by:

- Speaking at key industry or community meetings.
- Getting involved and volunteering in associations.
- Writing articles and columns in newsletters and trade magazines.
- Including testimonial letters or quotes in your package.

- By year-end 2002 I will speak or attend _____
and will be published in _____

I intend to target and infiltrate the _____
group/industry.

2. INVEST IN PRE-CALL PLANNING TO INCREASE YOUR CLOSE RATIO

**“A good salesman is one who expects to win!
He doesn’t go out to make calls -- he goes out to make SALES!”**

- Dave Hagenbuch

- Develop a consistent pre-call planning process to increase sales call effectiveness and closing ratio.
- Think of yourself as a consultant and advisor!
- Strategize with your team/coach to prepare, anticipate and sell against the competition. (Shop the competition whenever possible.)

(See sample form on next page.)

To reinforce Pre Call Planning skills, purchase the audio CD of Barbara’s Pre Call Planning teleseminar with detailed call planning form. To order, email Cindy@RomanoSanfilippo.com or use the fax back form.

PRE-CALL PLANNING STRATEGY CHECKLIST

Officer: _____

Prospect / Customer: _____

Phone: (_____) _____ **Email:** _____

Objectives of the Call

What do you know about this customer/prospect or their business? What client intelligence or documents can you gather prior to the call?

Current services utilized

Potential Needs/Cross-Sell opportunities and benefits to the customer. Prepare to discuss at least three services – think big and expand the relationship!

Product / Need

Benefit

Key Open Probing Questions (How, what, tell me)

Strategic Questions:

Tell me what your _____
_____?

If you could create the “dream” relationship with _____
what would it look like _____?

Product Questions:

What has been your experience with _____?
How do you currently handle _____
_____?

Competitive Information

Potential Objections or Obstacles

Key Players/Experts Needed on Call

Role of each Player/Expert, if joint call with your manager:

- Who will open the call?
- Who will probe for needs?
- Who will handle objections about _____?
- Who will handle fee questions?
- Who will close and when?
- Other:

List client decision makers, influencers and all attendees. (Are there any “advocates” or “resistors” you can talk to in advance of your call?)

Check one day prior to your call to confirm your meeting and ask if there are any changes in the attendees or meeting length.

Sales Call Agenda/Format

Brochures/Testimonials/Presentation Materials Needed

Closing Strategy/Ask For Commitment

Sense of Urgency/Need (1-5) ___

Allotted time for call _____

3. COACH AND CRITIQUE SALES CALLS TO ACHIEVE MASTERY

- Periodically invite your manager or respected peer on calls for the purpose of critiquing and offering suggestions.

- Audiotape a sales call if possible.

- Make joint calls with other product partners/sales reps.

- Immediately after a call, conduct a self-critique and ask your manager/peer to provide feedback based on a checklist. Identify your strengths first and areas for improvement. (See sample form on next page.)

Most common mistakes made in sales presentations:

- | | |
|----|----|
| 1. | 4. |
| 2. | 5. |
| 3. | 6. |

To order a copy of Barbara's CD recorded from her teleseminar, "Master The Sales Call Process – A Self Evaluation", email Cindy@RomanoSanfilippo.com, call 1-877-I Succeed or use the order form on the last page.

**Ask About Barbara's Private Telecoaching
To Increase Your Business!**

EVALUATION / OBSERVATION FORM

Name: _____ Date: _____

Position: _____

Rate 1-10*

Preparation and Pre-Call Planning _____

Professional Appearance _____

Self-Organization (Properly Planned Day) _____

Knowledge of Customer _____

Knowledge of Competition _____

Selling Skills

Establishing Rapport _____

Listening Skills _____

Determining Needs/Probing (Open vs. Closed Probes) _____

Presenting Benefits And Clear Explanations _____

Product Knowledge _____

Use of Brochures, Sales Tools, Testimonials _____

Handling Objections (Acknowledge, Probe or Respond) _____

Closing/Ask for the Business _____

Attitude _____

Areas for Improvement:

* On the 1-10 scale, 1 is very poor; 10 is perfect. Less than 4 is well below standard; more than 7 is good.

4. DEVELOP LOYAL CLIENTS BY ADDING VALUE AND COMPETING ON SERVICE

- Reach out and contact neglected clients with unfulfilled needs.
- Identify and retain your "best" clients by adding "value" or high-touch service such as:
 - Reviewing their entire relationship holistically and referring to the appropriate partners or sources.
 - Conducting educational seminars or cost effective "teleseminars". (To rent a bridge line, call Dutch Huetten at 888/311-8841.)
 - Use email to send educational ezines, success stories and articles to clients and prospects. (See sample.)
- To ensure client satisfaction and expand relationships, it is important to:
 - Conduct client _____ meetings and periodically _____ client satisfaction.

(Remind the client of the value you provide which is often transparent to them.)
- Demonstrate appreciation with thoughtful gestures such as: CDs, magazines, lunches, birthday acknowledgements, etc.

To order a copy of Barbara's CD recorded from her teleseminar, "Manage Your Book Of Business", use the order form on the last page.

To schedule a private teleseminar for your company on a topic of your choice, email Barb@romanosanfilippo.com

SAMPLE EZINE

Subject	: Transcend System - Affordable, Practical, Effective - Sales Management for Community Banks and Credit Unions
Date	: Fri, 11 Jan 2002 09:26:00 -0800
Linked to	: Steve Sherman
From	: "Steve Sherman" < ssherman@transcendsystems.com >
To	: < Bob@RomanoSanfilippo.com >

Transcend Systems is excited to welcome Community Bank & Trust in TX as one of our newest customers. We look forward to working with another organization that is client focused and relationship driven.

They look forward to an integrated Relationship Management system that will help them excel at Sales, Service, Marketing and Convenience for their customers.

DEATH OF THE CROSS-SALE

Do you want fries with that? Do you want an ATM card? Shall I super-size it? We have a VISA debit card with no charge, shall I order it now? Do you want to see a great tie to go with the shirt? Shall we upgrade this account to a Money Market today? Did you save room for dessert?

Each of these questions is likely to result in a cross-sale. But will these questions grow a strong relationship with the client?

These are product-pushing questions. They present a product suggestion for the client's yes-or-no decision. This is where many organization's sales development often begins. First, make employees and clients aware of complementary products. Get employees to make recommendations. Count the cross-sales.

Our best employees move naturally to become relationship-oriented. They learn early-on that a different questioning strategy will result in cross-sales and stronger relationships with the client.

* "Tell me how you use your checking account on a typical day." (Then listen for the cues for ATM, Debit Card, Direct Deposit, etc.; and make appropriate product recommendations tied to the client's stated needs and preferences.)

* "What plans do you have over then next 6 - 12 months that may require borrowing?" (Listen for cues, agree on when to follow-up, keep the promise to be in touch at the right time with the right product recommendation.)

* "What are your savings and investing goals for the next several years?" (Listen for opportunities to help the client achieve financial goals, plan to be in touch at the right time.)

Get your sales team ready to move from product-pushing to focusing on relationships. Build the skills now that make it possible to focus on clients rather than on products. Kill the cross-sale,

and watch services-per-client improve.

Steve Sherman, President

800-995-0112

ssherman@transcendsystems.com

City / State / Zip _____

Phone _____ Ext. _____ Fax _____

E Mail _____ Web _____