The Baron Group, Inc.

Teaching Salespeople the Five 'Ws' *and the 'H' of Sales Call Planning*

by Kate Reilly and Eric Baron

Who, what, where, when, when, why and how aren't questions only reporters should ask. Salespeople, too, can use those questions to prepare themselves for sales calls.

Mention the word "planning" and people start to yawn. No wonder. It's a tedious and boring process; and it forces people to think.

Salespeople may dislike planning even more than most executives. Because they're quick on their feet, salespeople often think it's unnecessary to prepare for sales calls. As we've observed salespeople at work, we've been surprised at the little amount of time they spend planning.

To the chagrin of many salespeople, pre-call planning is important. To prepare themselves adequately for sales calls, salespeople should answer the same six questions reporters do: who, what, where, when, why and how.

WHAT'S FIRST

Let's start with *what* because it refers in part to the most important question: What are the meeting's objectives?

Michael Doyle and David Strauss, co-authors of "How to make Meetings Work," maintain that 11 million meetings are held daily in the United States. Each meeting is different. But most of them have one thing in common: They won't accomplish their objectives for a variety of reasons.

Let's focus on a unique meeting: the sales call. Ideally, salespeople should have several objectives for each call. Various criteria need to be established. All objectives should be challenging, specific, realistic and measurable.

To set objectives, salespeople can ask themselves what they want customers to do as a result of the visit. Then, during the actual call, salespeople should ask customers what they want to get out of the meeting, and then tell them why they're there.

Salespeople usually initiate most meetings for specific reasons, thus they should take responsibility for the agenda and get things moving. If their customers initiate meetings, however, salespeople should determine before hand what their customers want to discuss.

It's amazing—and unfortunate—how many customers don't know what's going on during sales calls. Sales calls without objectives can waste buyers' and sellers' time.

Salespeople also should ask themselves what objections they expect customers to raise. They'll be better prepared if they anticipate those objections and think about how they will address them. But a word of caution: If salespeople spend too much time anticipating objections, they may respond to them before they're raised.

Salespeople also should prepare a list of questions to ask. The more questions they ask, the more likelihood of success.

WHO'S NEXT

The *who* part of the planning process has three sections: the buyer, the resources available to salespeople, and referrals.

The buyer—Many salespeople don't know how decisions are made at their clients' companies, or who makes them; thus they're ill-prepared to handle their accounts. Statistics show that many salespeople often call on someone other than the person who makes, influences or implements decisions. That should frighten any sales manager, especially considering the cost of sales calls today.

But let's face it: It's a tough question to ask, especially if the salesperson has been calling on the account for more than six months. If a salesperson starts asking about the decision making process months after the first call, the buyer may get suspicious, fearing the salesperson is trying to go over his or her head.

Ideally, salespeople should ask the question early in the relationship. It's also easy to justify the question during the turnover call, when a salesperson who is leaving a territory introduces his or her replacement to the customer.

For example, a salesperson can ask, "Just so I can best manage your account, would you help me understand the decision-making process?" Salespeople should explain to customers that they need the information to become better resources.

Methods of obtaining the information vary. Some blame the boss. Others ask for organizational charts. Some salespeople even bring along someone else to ask.

Available resources—A company's employees are a valuable resource to a sales force. Yet salespeople don't always take advantage of them. To make a sales call more effective, salespeople can invite a fellow employee from customer service, technical service, credit, research and development, marketing, sales management—or even another salesperson.

Referrals—Every sales call gives salespeople new leads—inside and outside their clients' companies. During the planning process, it behooves salespeople to think of who might give referrals, as well as to think of a way to ask for them.

WHERE

Where is a defensive planning question. It applies to those awful situations when a customer allows interruptions during the meeting, such as phone calls. That distracts the salesperson and makes the sales call a waste of time.

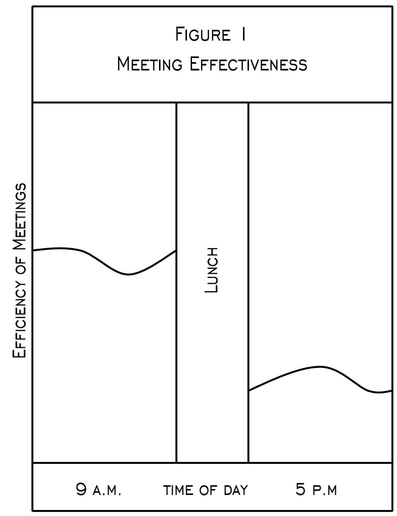
Salespeople should learn to be proactive. It's best to deal with "busy" people—which may be a euphemism for customers who don't give salespeople the respect they deserve—out of their offices. They can take their customers out for a cup of coffee or out to lunch, for example. They can arrange for a conference room, or meet in the cafeteria or in another office. Salespeople also shouldn't rule out their own offices as meeting places.

One of our clients has found a successful way to deal with a chronic interrupter: He arrives early for his appointments and conveniently drops off his briefcase and papers in a nearby empty conference room. When the client is ready to meet, the salesperson apologizes for not having what he needs and "invites" the client back to the conference room.

Salespeople also should determine where to entertain their clients.

WHEN

Our work with various groups has shown that people work best first thing in the morning, regardless of the makeup of the group or what they did the night before. *Figure 1* shows a drop-off in productivity at midmorning, then as noontime nears, it rebounds because people sense the lunch "deadline."



The least productive time of the day is immediately after lunch. Productivity improves as the afternoon drags on. Then, with the end of the day in sight, another rebound occurs. Although *Figure 1* is based on experience, most people would agree with its relative value. Now, let's apply the data to sales calls.

Many salespeople refrain from making sales calls early in the morning. Yet—except perhaps for Mondays—it can be an excellent time to meet, if the client is willing. A breakfast meeting can be most productive, whether it's at a restaurant, or over a donut and coffee in the customer's office. The day is fresh and, in most cases, the client has not yet been distracted with assignments or problems.

Many salespeople have lunch with customers and then conduct business. Yet as *Figure 1* shows, that's the least productive time of the day. As a result, that can work against the chance for a successful, productive meeting.

We recommend that salespeople talk business with their clients in the office before lunch, when productivity is on the upswing. Then, salespeople can use lunch to tie up loose ends or get to know their customers better. As an added benefit, the travel time to the next appointment gives salespeople a good chance to gear up for the afternoon because it's the least productive time of day.

Though late afternoon calls—except on Fridays—are good from a productivity standpoint, salespeople must be sensitive to their customer's schedules. Perhaps the client has to leave exactly at 5 p.m. to pick up his or her children at a day care center. Or maybe the client has to catch the 5:17 p.m. train.

Sales calls during or after dinner can be less valuable than after lunch because salespeople risk imposing on their clients' personal time. That can, however, be a good time for developing relationships.

WHY

Why is deceptively simple. It involves asking. "Why do I want to make this sales call?" It forces salespeople to examine their motives. Let's look at the *why* question from a variety of perspectives, remembering that sales calls can be very expensive.

Most salespeople use some kind of system to classify accounts: The most common is to designate them A, B or C. That's usually tied to the Axiom that 80% of a salesperson's business comes from 20% of his or her customers.

Let's say, for example that a salesperson has two key A accounts that he or she sees once a month, which are close to a smaller, less-important C account. Chances are that the sales person will call on the small account as often as the major one because it's nearby.

We maintain, however, that that's not a good use of the salesperson's time. The salesperson could do the company more good by using that time to travel to another account, telephone prospects, write follow up letters or just think.

Consider these questions when planning a sales trip. Could I accomplish my objectives on the telephone or by letter? Is it critical to see that customer? Am I calling on that customer just because I like him or her? Am I avoiding someone with more potential?

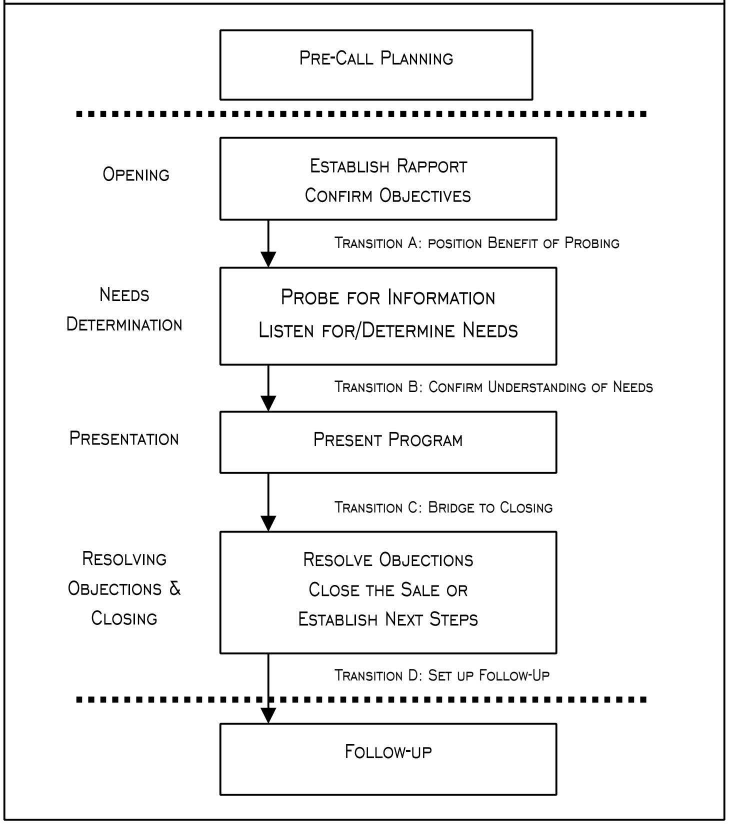
HOW

How is the process question—it addresses what approaches to take. Salespeople too often rely totally on their own instincts. Instinct is a marvelous gift, and it can be even more effective with some planning. Salespeople should carefully plan for the *how* part of their sales calls. No one likes canned presentations or rehearsed sales pitches so salespeople shouldn't go in with a script.

First, the salesperson should breakdown the sales call into four basic components, as shown in *figure 2*: the opening—when the salesperson establishes rapport and sets the agenda; the needs development—when the salesperson develops needs by asking questions and listening; the presentation—when the salesperson explains what his or her company has to offer, and the close—when objections are resolved and the sale is made, or—at least—when the next steps are identified.

Salespeople should identify where they are in the process: They may complete only part or all of the steps. Next, they should compare their position with the call's objectives.

FIGURE 2
NEEDS-DRIVEN SELLING SEQUENCE



Next, salespeople can think about how they will make the transition from one phase to the next. How will they get permission to obtain the information needed to develop needs? What trial close would fit once they conclude the presentation? How do they get started? How and when should they ask for the order? Remember, no scripts—salespeople should just think about how to make their presentation flow and feel comfortable with it. Plus, they should think about how to prepare for those times when they may be tongue-tied. Salespeople also should remember to prepare themselves for objections. But, again, they shouldn't go into the sales call expecting to hear objections that may not be raised.

Reporters aren't the only professionals who can benefit by using the five "Ws" and the "H" in their jobs. By asking themselves who, what, where, why, when and how, salespeople will be well prepared to tackle any unwelcome surprises that pop up during sales calls.