

How to Sell Face to Face: SURVIVAL GUIDE

Table of Contents and Sample Chapters 3&4

The book is in a 6x9 format, and these sample pages reflect that size.



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3

Getting past the Gate or Screen

1. **When you phone the Prospect, you may encounter a Gatekeeper, or Screen.**

If you'll be selling to business people, bear in mind that they juggle a lot of calls on their time and attention. They're busy, and they want to focus on what they consider most important.

Chatting with unknown sales people is usually not high on their list of important things to do with their time. (Unfair? Maybe so, but it's *your* job to convince them why it is important to meet with you.)

In any case, many business people set up various kinds of gates or screens to minimize unimportant and unnecessary interruptions.

The Gatekeepers you are likely to encounter may begin with the security guard at the gate, include the receptionist, and extend to the administrative assistant who guards the final door to the Prospect's office.

An answering machine may also serve as a gatekeeper: we'll focus on the how-to of answering machines and voice mail in item 3, below.

2. **Bear in mind that this Gatekeeper is not there to keep you out; rather, their role is to protect the boss from *unnecessary interruptions*.**

The Gatekeeper is in place to minimize distractions so the Boss can focus on what is truly significant to the organization.

What is truly significant? Depends on the context. A dentist may convey to the staff that what is truly significant is the time spent looking into

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patients' mouths. A shop-owner may be torn between spending time with customers, keeping up with paper-work, and ordering new merchandise.

The way to open the gate is to focus your introduction on whatever is truly significant to this unique Prospect. The Gatekeeper will open for you if, and only if, you communicate, through your words and professionalism (that is, your *appropriate business telephone etiquette*) that you have the potential of bringing something of significant value to the organization (your truly *significant business purpose*).

Business telephone etiquette

Business telephone etiquette with the Gatekeeper means,

- first, not coming across as rude or arrogant: they are only doing their job of shielding the person for whom they work;
- second, proper business telephone etiquette with the Gatekeeper focuses on helping them see why you and what you offer will be important to that executive—that is, by making it clear why this meeting is important to the boss;
- third, telephone etiquette in the business context means getting to the point, not wasting time in chit-chat, yet not appearing abrupt or condescending. (We'll get into this aspect below.)

How-to use "significant business purposes" as a key to open the gate

Though we use the term *business purpose*, the same concept applies if you are selling to non-profits, government organizations, or individuals: their significant purpose is what matters to them.

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Tip #1. Make the Screen your ally.

When you phone, listen closely for the name of the person who answers, and then use that name: “Hello, Mr. Gordon, my name is _____”

People like to hear their name used. It’s a token of respect, and makes the conversation more personal and human.

Another reason to listen closely to the name: this may be someone you met earlier when you were on the premises researching the organization as a potential client. If the name is familiar, remind them of your previous conversation so they can match a face with your voice on the phone.

Tip #2. If possible, mention the name of someone who referred you, or made some other kind of Pre-Introduction.

If you are calling this Prospect at the suggestion of another of your clients or of a mutual friend, make that clear at the very start, both to the Screen, and later to the Prospect: “I’m calling at the suggestion of Ralph Meador of Meador Associates.”

If you already know the Decision Maker from another context, mention this to the Screen, but be careful how you word it. You don’t want the Prospect to come to the phone—or to avoid you—because he thinks you’re setting up a tournament at the country club, or asking for a donation to the college alumni fund.

Once you have set that other context as a door-opener, then quickly move on to your present business purpose.

Tip #3. Pre-sell the Screen. But speak only in broad concepts. DO NOT become drawn into the details.

In persuading the Screen to put you through to the Prospect, you’ll obviously need to talk some about your business purpose for calling. But beware of saying too much.

Basic principle:
You cannot *make* the sale over the phone,
but you *can lose it*.

When you're on the phone (particularly with the gatekeeper), speak in overall conceptual terms of what your product or service WILL DO FOR the organization, not of what it IS, nor of its technical features.

The more you get into the details and specifics of what you are offering, the more reasons you'll give the Gatekeeper for keeping you out: "You say you work with computers? Well, there's no point in your seeing Mr. Chase, as we already have our own in-house computer expert."

Solution: in this case, do not say "computers." Instead, speak of "methods for increasing productivity," or "techniques for developing more efficient work-flows." That is, focus on concepts and end-results, not the how-to. Leave that for later.

Or say, "I'd like to speak to Mr. Dobson about some methods that may be able to increase your organization's productivity by ten-percent or more, as we have with other firms."

Tip #4. If necessary, ask questions the Gatekeeper won't be able to answer.

The overall point to make is that you need to see the Prospect because you have a sound business purpose in mind—something that will help that executive or the organization work better.

But some Gatekeepers won't be satisfied with broad concepts—like efficiency, productivity, and the like. As a ploy, they may try to put you on the defensive by asking questions, trying to draw you into divulging the kind of details that they can use to say no. Remedy: if you encounter that, regain control of the situation by asking your own questions, as in this model dialogue:

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Screen: *What is it you want to talk to Mr. Builder about?*

Sales person: *Mr. Builder is the construction engineer on the PDM Center, isn't he?*

Screen: *Yes, of course. But why do you need to talk to him?*

Sales person: *I'm calling to determine whether the PDM Center is being built in accord with the NEPA Standards on hydro-thalassic transaxions. Can you help me with that?*

Screen: *I have no idea on that. For that, you'll have to talk to Mr. Builder. Hold, please.*

With a little ingenuity you should be able to come up with a repertoire of unanswerable questions like these. The questions should be relevant to the reason for your call to the Prospect, but more technical or detailed than a receptionist or secretary would be prepared or willing to address.

Tip #5. Last resort, call when the Screen is away.

If you find that, no matter what, you just can't get through the Screen, try phoning before or after normal business hours, or even over the lunch hour: Prospects—usually managers—tend to be at their desks earlier, or later, or both, to take advantage of the quiet time when the office is empty.

In off hours, Prospects often answer their own phones. If you do get the Prospect on the line, be particularly brief and to-the-point, respecting that she is in the office at this time precisely in order to avoid interruptions.

Especially when you are speaking to the Prospect, get to the point—FAST—both on the phone and later when face-to-face.

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3. When voice-mail is the Screen.

Voice-mail forms another kind of gate, keeping you from talking directly to the Prospect in organizations both small and large.

Above all, don't try to wing your response. Decide just what message you want to leave, then boil it down so it gets quickly to the point. Rehearse your message until you can say it confidently and with a smile in your voice.

All set? Not quite. Before leaving your first message on a Prospect's voice-mail, call your own voice-mail and leave the same message. Analyze it, from a Prospect's perspective. Revise and rehearse it again until it is right.

Other considerations to settle before calling:

✓ **Should you leave a message on voice-mail, or keep trying to reach the Prospect directly?**

If you leave your name, then you leave it in the Prospect's hands to respond. That means you lose control.

It gets awkward if the Prospect doesn't return your call: Does no response mean no interest, or just busy right now?

Here's a strategy that works for me: try calling a few times, not leaving your name. Call at different times, hoping to finally get the Prospect at the desk. If the pattern becomes clear that you're not likely to catch the person, then go ahead and leave your name and number. You may or may not get a call-back, but at least you have tried all paths.

✓ **Should the message you leave identify your company name, or your reason for calling?**

If the Prospect thinks you are a potential buyer of his services, he will be more likely to return the call than if he knows you are doing the selling.

On the other hand, a busy Prospect may not bother returning voice-mail calls that lack information. The best approach is usually to speak clearly, saying your name, maybe your company name (if you operate under a company format), and your phone number.

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Tip: ever find yourself frustrated by people who leave you voice-mail, but then do a fast-mumble of their phone number, so you have to listen to the whole message again? They've said that number so often that easy to take for granted that everyone knows it. Do you really want Prospects to have to replay, and replay again, to pick up your call-back number?

- ✓ **Above all, definitely do not try to *make* the sale, or even describe your product, over voice-mail.**

Reason: You can only *lose* the sale via voice-mail, but you cannot *make* the sale.

Summary: Getting past the Gate

1. When you phone the Prospect, you may encounter a Gatekeeper, or Screen.
2. Bear in mind that Gatekeeper is not there to keep you out; rather, their role is to protect the boss from *unnecessary* interruptions.

Tip #1. Make the Screen your ally.

Tip #2. If possible, mention the name of the person who referred you, or perhaps made some other kind of Pre-Introduction.

Tip #3. Pre-sell the Screen, if possible. But speak only in broad concepts. DO NOT become drawn into the details.

Tip #4. If necessary, ask questions the Screen won't be able to answer.

Tip #5. If nothing else works, call when the Screen is away.

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3. On those occasions when voice-mail is the Screen, settle these issues in your mind before you place the call:
- ✓ Will you leave a message on voice-mail, or keep trying to reach the Prospect directly?
 - ✓ Whether the message you leave should identify your company or your reason for calling?
 - ✓ What will you say to intrigue the Prospect without saying so much that he or she can cross you off?

4

Making your first phone contact with the Prospect

Seconds count once you get past the Screen and have the Prospect on the line. In most cases, the first 30 seconds on the line make or break the call. This is not the time to be fumbling for words, or wasting on “ice-breakers” such as, “How are you today, Mr. Jacoby?”

1. **Think of this initial call for an appointment as the “Call-up, fix-up, hang-up.” That is, Get the person on the phone, get to the point, then get off the phone.**

The Prospects you phone during the business day are going to be involved in other work as you call, and usually will not have the desire or the time to get tied up in an extended phone conversation.

Besides, every minute that you're on the line raises the odds of another interruption coming in, so get to the point and complete your objective before you're bumped.

2. **This first phone contact is not the place to try to make your case. You can only *lose* the sale, but *not make* it, over the phone.**

Notice that this “Call-up, fix-up, hang-up” phase of the selling cycle does not include “Sign-up,” because, no matter how much you say, or how

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great the discounts you offer, you cannot make the sale over the phone.

But—a big but—you can talk yourself out of the chance of meeting face-to-face, and hence out of making the sale altogether. When it comes to the telephone, the less said the better.

This caution against making the case over the phone does not apply if your full selling cycle occurs over the phone. Telephone marketing (or “telemarketing”) is useful with certain products (usually relatively low-cost items that don't require face-to-face contact. Telemarketing is not a subject we address in this book.

3. Once you have the Prospect on the phone, aim to accomplish three key tasks within the first 30 seconds.

This is a business call, not a social call, so in most cases it's best to get right to business. You are most likely to have the Prospect's full attention during the first half-minute of the call, so use those 30 seconds productively by getting on with these three essential tasks:

- *Introduce* yourself and your company.
- *Excite* the Prospect's interest in meeting with you to find out more.
- *Ask the Prospect to meet* at a specific time.

“Excite” and “interest” are both key words. In your short phone statement, focus on what you can do for the Prospect, not the details of what your product or service is.

The object at this point is to *whet* the Prospect's interest, *not* to satisfy it. After all, if you satisfy the Prospect's interest over the phone, then there is no need for her to meet face-to-face.

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Accomplishing these three tasks of introducing yourself, exciting interest, and asking for a meeting may seem like a lot to accomplish in 30 seconds, but it can be done, as in this example:

“Mr. Whidby, this is Tina Rowland, of the Rowland Consulting Group. I’m calling because I’d like the opportunity to show you how we have boosted the profitability of firms like yours by as much as ten percent over a six-month period. The meeting would take about 20 minutes. I’m going to be in Hopkinsville next week on Tuesday morning and Friday afternoon. Which would be better for you?”

- 4. Make it clear at the start of the call if you are following up at the request of this Prospect, or if you are acquainted from another context.**

Example:

“You may recall that we met last month at the GTS Trade Show, where we discussed the effect of _____. I’ve given some thought to what we discussed then, and I have some ideas that might be of help to you. I could stop by to share these ideas with you sometime—perhaps on Monday afternoon? Or would later in the week be better for you?”

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5. **One of the best tools for exciting the Prospect's interest in meeting with you is a referral from someone they know and respect, or who has similar job responsibilities in another firm).**

Earlier, we addressed the benefits of using referrals as a way of breaking through the screen. Referrals are equally useful when speaking to the Prospect herself:

“As I mentioned to your secretary, I'm calling at the suggestion of Robert Clarkson at GNI Software.”

Another example, this time tying the request to meet into the initial statement:

“I'm calling at the suggestion of Doreen Masters, who I believe you know through the local chapter of the Computer Design Professionals' Association. She knows of my work, and thought it would be of particular interest to you.”

You may need to pause a moment for the name to register, then go on to say,

“I'm going to be in Hopkinsville next week on Tuesday morning and again on Friday afternoon, and am free to meet either time. Which would be better for you?”

It's even better if the person who referred you is already a customer:

“I'm calling at the suggestion of Robert Clarkson at GNI Software, who's been a client of ours for about a year now. Perhaps he has mentioned our work to you?”

If your referral has called ahead to introduce you, so much the better. If not, move on to the core of your message:

“As we've been able to help GNI, I believe we may also be able to help you, and I think it would be beneficial for us to meet to explore your situation. Would you be free, say, tomorrow afternoon, or would Friday morning be better for you?”

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Unless you're certain that the present Prospect and your referral face exactly the same need, it's best to leave open just how you can help. If you get drawn into the details of what you did for this other client, there's a risk that your new Prospect may respond with words to the effect, "Well, that sounds nice, but we don't need anything like that."

The point of the reference is to establish your credibility, not to suggest that the other project would be an exact template for this situation.

Summary: Your first phone contact with the Prospect

1. Think of this initial call for an appointment as the "Call-up, fix-up, hang-up." That is, Get them on the phone, get to the point, then get off the phone.
2. This first phone contact is not the place to try to make your case. You can only lose the sale, but not make it, over the phone.
3. Once you have the Prospect on the phone, aim to accomplish three key tasks within the first 30 seconds.
4. Make it clear at the start of the call if you are following up at the request of this Prospect, or if you are acquainted from another context.
5. One of the best tools for exciting the Prospect's interest in meeting with you is a referral from someone they know and respect (or who has similar job responsibilities in another firm).

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