CPSA

PROFESSIONAL DEVELOPMENT UNIT BUNDLE

COMPETENCY: Prospecting

SECTION: Prospect Planning

PDU VALUE: 3 PDUS

LEARNING OUTCOMES:

- Improve Telephone Prospecting Success
- Understand Which Sales Calls will lead to the best sales Opportunities
- Script your Call Effectively
- Solve 5 Common Cold Calling Scenarios.
- Improve your Prospecting Approach with Hesitant Prospects
- Understand Your Annual Sales Checklist - The CPSA Sales Playbook
- Apply the 6 Critical Selling Skills
- Develop Rapport with Prospects
- Build Face-Time with Prospects and Clients
- Use Key Follow-Up Strategies to Keep your Prospect Engaged

CANADIAN
PROFESSIONAL
SALES
ASSOCIATION

CPSA

Why do Professional Development Unit (PDU) Bundles exist?

Whether you're maintaining your CPSA Designation, or wishing to develop your skills in sales, our PDU Bundles are made to strengthen and reinforce the skills you need to help reach new heights in your career.

Maintaining your designation gives evidence of your commitment to the principle of lifelong learning and ensures that your professional sales skills are developed as markets, customers, and innovative technologies evolve.

As the holder of a professional sales designation, you are required to meet the annual Professional Development Units (PDU) requirement. This process ensures that you are up-to-date on the most current issues and practices in sales.

WHAT YOU'LL LEARN FROM THIS PDU BUNDLE:

Jc_pl fmu m,,,

SECTION 1:

SALES CALLING

Material:

- Habits of Improving Telephone Prospecting Success
- Which Sales Calls will lead to the best sales Opportunities?
- Scripting your Call
- Cold Calling - 5 Scenarios, 5 Solutions

Author: Canadian Professional Sales Association

With all of the hype around social selling, AI, and lead generation, it is easy to overlook the old-standby method – the telephone. When used as part of a wider content and social selling strategy, telephone prospecting is still a great way to engage leads and secure meetings. You have your prospect's complete attention when you get them on the phone, and you are able to get more information than you can through almost any other channel. However, telephone prospecting is also one of the more difficult ways to build your funnel, so it is important that you prospect the right way. Here are some of the habits you need to adopt to succeed.

1. Script Your Introduction

It's hard to get through to your prospect on the phone, and so it's critical to get your brand's story straight when you do. If you get cold-call fright and forget all of your key messages as soon as someone responds on the other end of the line, it is a good idea to use a script. You need to clearly explain your offer and the reason for your call within the first 30 seconds, so write down your first few points. While it may seem unnatural to read a script on the phone, you will feel more confident knowing that you won't forget what to say, and it will help you memorize your key points so that you can go off-script in the future.

2. Remember to Ask Questions

While it is a good practice to script the first few seconds of the call, it is absolutely not a good practice to script your entire call. You need to ask questions to be successful with telephone prospecting. Is your prospect in the role or department that deals with these decisions? What are your prospect's pain points? You need this information to be successful in your sale, and you will not get the answers if you are talking the whole time.

3. Be Persistent

Don't be discouraged if you hear "no" on your phone call; most sales calls do not succeed on the first try. The number of calls you should make will vary depending on your industry, product, and organization, so there is no set rule. Be persistent in your calls, and try to get new information from each one. On your first call you should try to discover whether you have reached the right contact. Perhaps on your second call you should aim to discover the prospect's pain point.

4. Schedule the Meeting While Still On the Phone

The harsh truth is that many prospects will tell you what you want to hear. They may agree to a meeting while on the phone with you, but avoid responding to your scheduling requests. To avoid this scenario, book the meeting while you are still on the phone. Find a time that works for everyone, and wait until they have accepted the meeting invite. This practice will push your booked meeting numbers up drastically.

Don't be afraid of the phone. Adopting these habits will ensure that your calls are productive and your meetings get booked.

WHICH SALES CALL QUESTIONS WILL LEAD TO THE BESTS SALES OPPORTUNITIES?

Author: Canadian Professional Sales Association

Much in the sales process is about timing. You need to get ahold of prospects at the right time of year before they've spent their budgets, but also when their need is the greatest. You also have to get in contact with them at the right time of day, when they are not swamped with meetings and are actually able to speak with you. Even when you've finally managed to get them on the phone, the clock is ticking, and every question you ask them has to count. Every question should lead to information that will help you frame the need that your services can resolve.

So which questions are the most important to ask? Different questions serve different tactical purposes. Take a look at some examples below of questions and the purposes they serve:

Information gathering: While you should already have done your research on the company and their potential needs, you should aim to gather additional knowledge from your contact that will further make your case.
- What are your expectations/requirements for a product/service like this?
- With whom have you had success in the past?
- What were the features that you liked?
- What challenge did you experience with that product?
- What is the usual process for implementing a new product or service like this?

Qualifying questions: Quickly gauge your prospect's interest or need for more information.
- What is your timeline for purchasing this kind of product/service
- Has budget been established for this?
- What other factors should we discuss before moving forward?
- What do you see as the next action steps?
- What concerns do you have?

Trust-developing questions: Show the prospect that you are concerned about addressing and supporting their needs, not just about making a sale.
- How long has your company been involved in…?
- What's your most important priority at this time and why?
- What would you like to see improved?
- How has the recent market trends been affecting your company?

Closing questions to ask yourself: Are you ready to close the sale?
- Is there value in my product/service for the prospect? Does the prospect understand this value?
- Have I minimized risk and other concerns for my prospect?
- Have I created urgency for the prospect?
- Have I demonstrated better value than the competition?

For more effective sales questions, click here.

Author: Canadian Professional Sales Association

1. You can use your unique value proposition and the templates below to script the telephone call to secure your appointment. Fill in the blanks to create your own warm-call telephone script from a modern lead generation campaign:

My suspect's name is ____

____

"Hi (NAME), my name is ____

____

I represent ____

____

(NAME), I'm calling as a follow-up to ____

____

You asked for ____

As you may know, we offer the only ____

____ ,

which helps you ____

____

Would you like to spend five minutes now exploring this topic further to determine if we should meet face-to-face, or should we schedule a phone chat later this week?"

____

____

____

____

____

____

____

____

____

____

____

____

____

____

____

____

Need some extra tips to help you ace your next sales call? [Read this article.]

Author: Canadian Professional Sales Association

2. Fill in the blanks to create your own cold-call telephone script.

My suspect's name is ______________________________

____

"Hi (NAME), my name is ______________________________

____

I represent ______________________________

____

(NAME), my research indicates that a typical issue/problem in your industry is ______________

____

Would you agree?

We offer the only ______________________________

______________________________,

which helps you ______________________________

____

Would you like to spend five minutes now exploring this topic further to determine if we should meet face-to-face, or should we schedule a phone chat later this week?"

____
____
____
____
____
____
____
____
____
____
____
____
____
____
____
____

Still need to improve your telephone prospecting skills? [Read article.]

Author: Canadian Professional Sales Association

Whether you are leaving a voicemail, reaching out to a prospect for the first time, doing a second follow-up or calling from a referral, cold calls of any variety, all stem from the same key elements. Use this guide and the accompanying scripts to breeze through all 5 cold calling scenarios, so you can get the sale!

What are the Elements of a Basic Cold Call?

For starters, keep in mind your prospect is likely bombarded by information on a daily basis. Whether they are receiving emails, direct mail or other cold calls, failing to set yourself apart from the competition could cost you the lead or even the sale. You must, therefore:

- Recognize Your Prospect
- Identify Yourself
- State the Reason for Your Call
- Make a Qualifying Statement
- Set the Appointment

5 Cold Calling Scenarios and 5 Solutions

Here are some helpful scripts for approaching each of the five different cold calling scenarios to ensure you don't lose your prospect.

You Get The Voicemail

Voicemail serves as an effective sales call block for many companies, so it's important to be upfront about your needs. Start by recognizing your prospect and introducing yourself and your company.

"Hi {their name}, I'm {your name} calling you from {company name}.

Don't waste time. State your reason for calling right away, ask to be called back and thank the prospect for their time.

I'm giving you a call today because I'd like to tell you a little more about {specific product or service}. I think we might be of interest to you because we can {state value proposition}. If you wouldn't mind giving me a call back at your convenience so we can discuss further, that would be great. I can be reached at {number}. I look forward to chatting with you!

What if You Make Contact?

You will want to recognize your prospect, introduce yourself and your company and immediately ask if you can tell them more. Requesting to expand the conversation gives the power over to your prospect, which is key to nurturing your call into a sale.

Request to expand:

{Name}, I hope I haven't caught you at a bad time. Would you be able to talk for a moment about your {service} needs?

Then, state the reason for your call – which should be the result of your offer. Determining a specific need is the next step – if there is no need for your services you don't want to waste your time or your prospect's time.

{Name}, I am calling to see if you could benefit from our {service} which can provide you with {value proposition}.

Once you've identified a need, move towards setting up the appointment.

I can send you some more information about our services and some testimonials from other clients who have found significant value for you to review. Would you be available {suggested follow up call time and date} for a call to discuss your thoughts after you have had some time to read over the material?

Once you get the confirmation, make sure you thank your prospect for their time and confirm the follow up.

Great {name}! I have you down for Wednesday at 3PM. I look forward to speaking with you! Thank you for your time today.

Don't muddy the conversation. Keep it focused on the next step - the appointment.

The Second Follow Up

Use this as an opportunity to talk about how your products and services can be tailored to the prospect's needs, but more importantly listen to the prospect to learn more about their business and issues. Determine if there is interest. If there is none, you may have an opportunity to be referred to other prospects. Two effective lines to use:

{Name}, I'd love to see if our services could benefit you at this time. From our conversation, it sounds like you need {service}. What are your thoughts about having us handle {need} for you?

Great! I'm so thankful for your time – do you happen to know anyone else at your company who might benefit from our products or services?

Always thank your prospect for the time they've taken to chat with you, even if you don't get the sale.

The Referral

Recognize your prospect and introduce yourself, then immediately let your prospect know you've been referred to them by a trusted source. Then follow the steps above to setting up the appointment.

Your colleague, {Name}, gave me your information and thought our services would be a good fit for you. Do you have a few minutes to chat?

Writing the Email

The goal is the same here. Emailing a follow-up should include recognizing your prospect, introducing your offer, giving more information and then requesting a follow-up.

Dear {Name} – Thanks so much for our chat yesterday! I think {Company} would be a good match for your needs. Please see some additional information attached for your reference.

If you'd like to set up a time to chat, you can reach me at {Your Phone} or I'd be glad to speak with you over email. Please let me know what works for you. Thanks so much for your time!

Using these key elements will help you build trust and become recognizable to your prospect. Learning the building blocks of a great sales call can help you keep your sales pipeline full and ultimately lead to more closed sales.

SECTION 2:

PROSPECT PLANNING

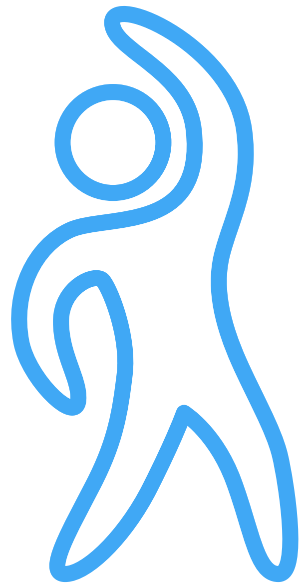
Material:

- Sales Success Playbook
- 5 Reasons Your Prospects are Avoiding you and How to Improve

SALES SUCCESS PLAYBOOK

Author: Canadian Professional Sales Association

REFLECT ON LAST YEAR



- **ANALYZE YOUR RESULTS**

  Before you take off and start tackling this year's goals, first take some time to look over the past year. Whether you missed, met, or exceeded your goals, it's important to reflect on your year and what you should change or keep the same.

  Don't just look at your final results; dig deep. Take the time to really analyze your performance, effort, skill, and confidence. For example, ask yourself:

- What percentage of leads converted?
- Did prospects tend to get stuck or lose interest at a certain stage?
- When were prospects most responsive?
- What approach worked best or did not work at all?
- What tasks slowed you down?
- If you could change one thing about your day, what would it be?

Getting used to analyzing your performance and projecting the pipeline is crucial to keeping yourself on track. Once you have taken a good look at the past, you should feel more confident planning for this year and have a better understanding of your sales habits.

ESTABLISH GOALS FOR THE NEW YEAR

- **CREATE QUOTA MINI-GOALS**

  Wrapping your head around an entire year's quota can be daunting. Make sure you stay on track and can accurately gauge your weekly and monthly planning by breaking your quota into smaller sections. Whatever works best for you—quarterly, monthly, or weekly. This gives you a better picture of how many leads and meetings you should be having within a set time frame.

  Smaller goals are more manageable and give you the ability to celebrate small successes throughout the year. It will also make updating your manager easier if you can accurately explain your progress and have a detailed understanding of what is expected of you.

- **MAKE A PLAN**

  Now that you have cut your quota into manageable mini-goals, make a plan for the year. Don't just take your quota into consideration; make a well-rounded plan including your performance, professional development, and department improvement. Take note of the metrics your manager will be focusing on. Obviously, your quota will be a main performance metric, but there are other ways your supervisors might be assessing your work. Ask about their expectations for conversion rates, customer satisfaction, referrals, etc.

  If you think you will need additional coaching or training, ask for it! The best become the best because they ask for help and practice their craft. Within the first month of the new year, make a goal to focus a full day on skills training.

  Read through the marketing and sales collateral you will be using this year. It's important to do this at the start of the year so you know exactly what content you have at your disposal and what information it contains. All content created is made to help you close the sale.

" THE BEST BECOME THE BEST BECAUSE THEY ASK FOR HELP AND PRACTICE THEIR CRAFT."

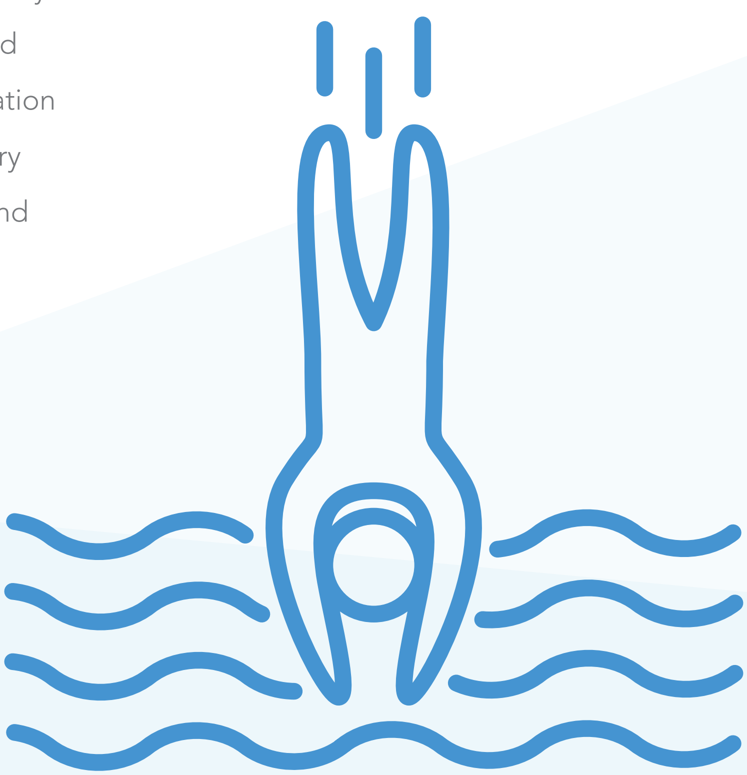
- **REACQUAINT YOURSELF WITH THE BUYER**

  Year over year, there might not be drastic changes in your typical buyer persona, but that doesn't mean your industry isn't changing. While your manager is preparing the sales team for the year, listen for any changes to your ideal prospect. Ask questions to see if there has been any strategy pivots to reflect successes and failures from the past year. Perhaps your target buyer is now older and spending money on items that you've never competed against. There are many reasons why you might need to update your strategy. Competitors, market size, and industry trends all influence how your buyers behave.

  Think about how your targets have shifted in:

- Company size
- Industry
- Need
- Location
- Salary
- Spend

"WHILE YOUR MANAGER IS PREPARING THE SALES TEAM FOR THE YEAR, LISTEN FOR ANY CHANGES TO YOUR IDEAL PROSPECT."



Make sure these changes end up in your sales and marketing processes. Sales and marketing content should reflect competitor and industry changes while speaking to your adjusted buyer persona. Your discovery questions will need to adapt because what was once a qualified lead may not qualify anymore. Also, channels and messaging will have to change based on your new buyer persona.

- **DEFINE RESPONSIBILITIES**

  Whether you're working with the same team from last year or introducing new members, the individual and departmental responsibilities must be clear. Your sales process is set, but unless everyone involved knows what they are responsible for and who they can turn to for help or clarity, things will fall through the cracks.

  Set as many guidelines as you can and make sure everyone is comfortable with their workloads while you start the year. New responsibilities can be added and adjusted later on, but building structure early is critical.

KICKOFF—GAME PLAN

SALES REP

- [ ] Analyze Last Year's Results
- [ ] Take out the Trash
- [ ] Share and Discuss Successes
- [ ] Create Quota Mini-Goals
- [ ] Make Your New Plan
- [ ] Reacquaint Yourself with the Buyer

Q2

GET IN THE GROOVE

GATHER FEEDBACK

- **PREPARE FOR REVIEW**

  By the beginning of the second quarter, you should be ready to have your first review with your manager. You need to explain how your pipeline is forecasting, your plans for making quota, and your results from the beginning of the year.

  Ask your manager beforehand if there are specific details they will be asking about or if there is anything else you can prepare. The more prepared you are for the meeting, the more confident you will be. Even if you haven't had great results so far this year, coming in with a solid plan will ease your manager's mind and set you up for future success.

- **BE OPEN TO TRAINING**

  Now that you are getting into the groove for the year, it's a great time to start building up your skills. At this point, your sales leader may be introducing some new training, asking you to attend seminars or webinars, bringing in sales coaches, or offering new sales tools.

  Take advantage of these learning opportunities. Whether you have been selling for years or are the green rep on the team, any learning experience is a good one. After your review, ask your manager if they could listen in on one of your calls or sit in on a meeting and provide feedback. Early on in the year is the time to refine your tactics and grow your professional skills.

CPSA

NURTURE LEADS

- **WORK ON YOUR SOCIAL SELLING**

  If you've been living under a rock, it might be news to you that consumer buying habits have changed. The buyer is in control and more and more salespeople are using social selling as a combative strategy.

  Despite the rise of social media and the millions of people it reaches, some companies are hesitant to implement a social selling strategy. Don't let that stop you from jumping on the social bandwagon. Work with your co-workers to come up with a strategy or just jump in and analyze your results. Use social media as a way to engage with your customers, find new prospects, and show off your personality.

- **COMMIT TO PRE-CALL RESEARCH HABITS**

  In our interconnected world, there is no need for you to reach out to a prospect with no background information. Social media makes it easy to get basic personal and company information for a variety of prospects.

  This part of social selling allows salespeople to gather information without even contacting the lead. A prospect's title, responsibilities, mutual connections, and interests can all be discovered on LinkedIn.

  Some other spaces you should take a look at are:

- Twitter (buyer and company)
- Company website
- Company media and press releases
- Trending news
- Industry blogs and publications
- Google (buyer and company)
- Competitor sites and news releases

Your first call with a prospect will establish trust and your voice as an authority. Don't use a cookie-cutter script. Take the time to do your research; the effort will be appreciated.

- **ADJUST SALES CONTENT THAT IS NOT EFFECTIVE**

  By now, you will have nurtured your leads through workflows, met with prospects, and sent more PDFs than you can count. The time has come to analyze how well your sales content is working and how it can be adjusted.

  Think about common questions you get from your prospects. Are those questions answered in your content? Have you accurately highlighted the features your buyers most respond to? Your marketing department is there to help. Work together to adjust sales content, aligning the two departments.

- **DEFINE AND PREDICT CHALLENGES**

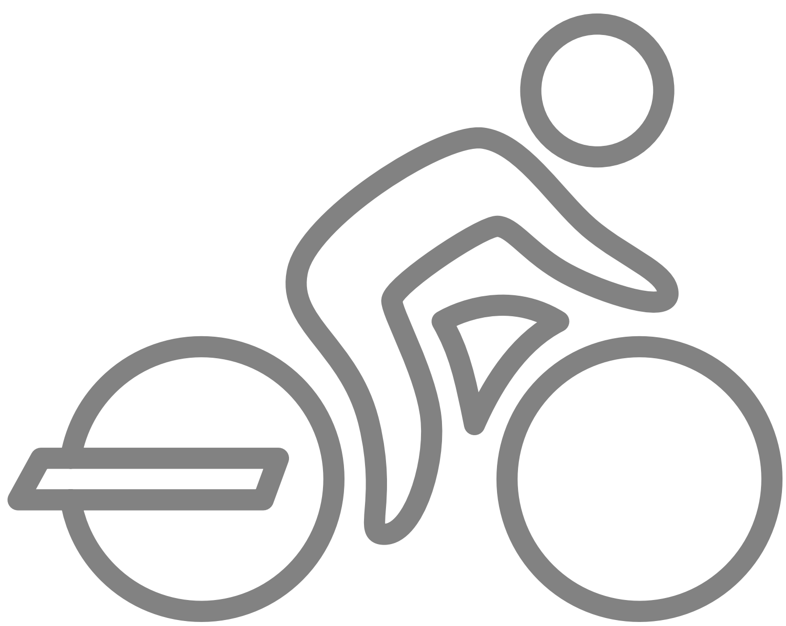
  You are now entering the summer season where people will be taking time off and buyers tend to be busy and distracted. As long as you understand these challenges and are prepared to meet them, this shouldn't be a problem. Put a name to any potential upcoming issue and have a plan in place before it impacts your numbers.

STAY MOTIVATED

- **PLAN AHEAD**

  The summer months of Q3 bring with them warm weather and holidays, weddings, and distractions. The same goes for your prospects. Although it's tempting to take your foot off the gas and enjoy the patio weather, don't let yourself become too complacent.

  Plan out your summer and recognize dates you will be away, as well as times your co-workers and manager will be out of the office. Before you leave, be sure to confirm someone is looking after your clients or set time aside to answer emails and other inquiries. While members of your team are away, don't use it as an excuse to slack off. You are holding down the fort and will only be hurting yourself in the long run if you check out.



SOCIAL SELLING

1. Track today's wins
2. Run a contest
3. Reward and recognize the team publicly
4. Plan team-building workshops and outings
5. Focus on sales activities, not results
6. Resist separating managers from sales reps
7. Encourage team and individual creativity
8. Be as transparent as possible
9. Over-deliver to your clients
10. Replace a typical meeting with a coffee break or walk around the block

Q4

FINISH STRONG

- **CLEAR OUT DEAD LEADS OR LOST ACCOUNTS**
  Now is not the time to get bogged down with inaccurate data and distracted focus. Schedule time to go through your CRM and remove dead leads and lost accounts. This information will confuse your numbers and can make you believe you have more prospects than you do. If you want to finish the year strong, you need to have an accurate picture of where you are and where you need to go. You can't see the full picture if you're still focusing on deals that are over.

- **SET UP SALES SEQUENCES OR ADJUST NURTURING CAMPAIGNS** For the last push of the year, it's time to get creative with your email campaigns. Talk to your co-workers and come up with a list of tactics that worked best for them. It's time to capture all the leads you have built all year and drive them towards the sale. Bring the list to your manager and create a plan for new sales sequences or email workflows. You should have lists of MQLs and SQLs. Work with marketing to create new content specifically for MQLs and SQLs from earlier last year.

Not only will this give you a great push and give your team some momentum, but it will also allow you to weed out deals that will be pushed to next year.

"THERE ARE AUTOMATION FEATURES THAT WOULD MAKE YOUR LIFE EASIER AND ADDITIONAL INFORMATION YOU ARE MISSING BECAUSE YOU AREN'T USING YOUR TOOLS TO THEIR FULL ADVANTAGE."

SET A PLAN TO LAND LARGE, UNDECIDED ACCOUNTS

There are always a few deals that everyone is counting on by the end of the year. These important contracts will either make or break your year. To keep your salespeople focused and boost their confidence, decide how you plan on closing these accounts.

Your involvement will give your salespeople an added weapon and will allow you to ask how certain steps in your strategy are working. Trying out a team strategy to closing a deal also gives you insights for the future. If a deal closes, you know the strategy was a success. If not, you can adjust and refine it for next time.

"TRYING OUT A TEAM STRATEGY TO CLOSING A DEAL ALSO GIVES YOU INSIGHTS FOR THE FUTURE. IF A DEAL CLOSES, YOU KNOW THE STRATEGY WAS A SUCCESS. "

It's a common problem for all sales professionals – prospects that avoid your attempts to contact them. While it may be common, know that you should not give up and simply assume that your leads have lost interest. You should test different approaches and get feedback so that you can re-engage prospects and close them over time. Here are some areas to focus on:

1. Problems with Your Pitch

Are you sending emails and leaving voicemails but not getting any responses? The problem could be in your pitch. Perhaps you are focusing on closing a sale when you should be offering a demo, or maybe you have too many call-to-actions and your prospects don't know what to do next.

The pitch is your first opportunity to tell your prospect why they should care about your product. It should be short, but also articulate the key information that will entice the prospect to hear more. Ensure that your call to action is clear too, since this will indicate whether your pitch is working.

2. Don't Bother Them When They are Busy

Another possibility is that your prospects aren't avoiding you at all – they just can't reply to you when you are contacting them. Most people are busy between 9-5, so if you are trying to get in touch with your prospects during these hours, there is a good chance they simply don't have time to reply.

You need to walk a careful balance between getting in touch with prospects when they are free and being respectful of their time so that you don't annoy them. Think carefully about the product you are selling and the time that your prospects may be thinking about buying it. If you're selling a B2B solution, perhaps it makes the most sense to call at lunch, when your prospects may have a few spare minutes but are still in "work-mode". It may make sense to send an email first thing in the morning so that it is the first thing your prospects see when they check their email. Or, if your product is consumer-focused, it may make sense to get in touch in the evening, when your prospects are likely at home.

3. Explaining the Benefits

If your prospects don't understand the value that you or your product provide, it is very likely that they will avoid you. It is critical to sell more than just features and products; you must focus on their needs and highlight the benefit that your product offers.

Your product may have several unique features, but your job is to explain why these features matter to your prospect. Do the features deliver efficiency and time savings? Do they give them better information? Explain how these features will make your prospects lives easier.

4. Giving Them Time to Become Ready for a Sale

Your prospects may be avoiding you because they may eventually buy from you, but aren't able to make the purchase right now. Instead of telling you that they need more time, they are simply avoiding your calls and emails.

If you have noticed that a prospect that seemed interested has now gone cold, find out if they have lost interest or simply need more time. While it is always disappointing to move an opportunity to the backburner, there's a good chance these types of leads will eventually close if you nurture them correctly.

5. Stop Focusing on Prospects Who Aren't Interested

The final reason that your prospects are avoiding you is that they are simply not interested in what you are selling. Perhaps they don't experience the pain point that your product solves, they have another solution that fits their needs, or they don't have the budget to purchase your product.

In this case, it is best to move on and put your effort into prospects that are interested in your product.

It's not always easy to determine why a prospect is avoiding you, but if you ensure that you are consistently adding value to the sales cycle, you understand their needs, and you answering questions promptly, your prospects won't be able to avoid you for long.

SECTION 3:

CRITICAL SELLING SKILLS

Material:

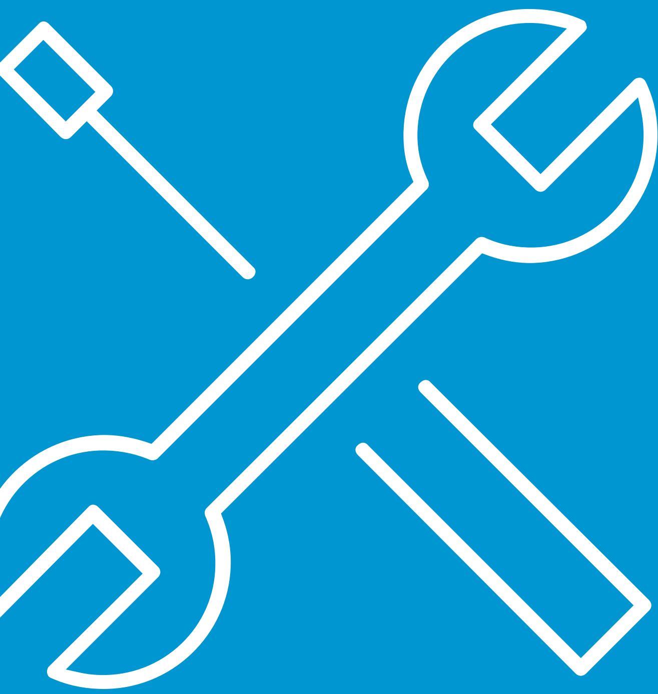
- eBook: Six Critical Selling Skills

CPSA

SIX CRITICAL SELLING SKILLS

Author: Canadian Professional Sales Association

CANADIAN
PROFESSIONAL
SALES
ASSOCIATION



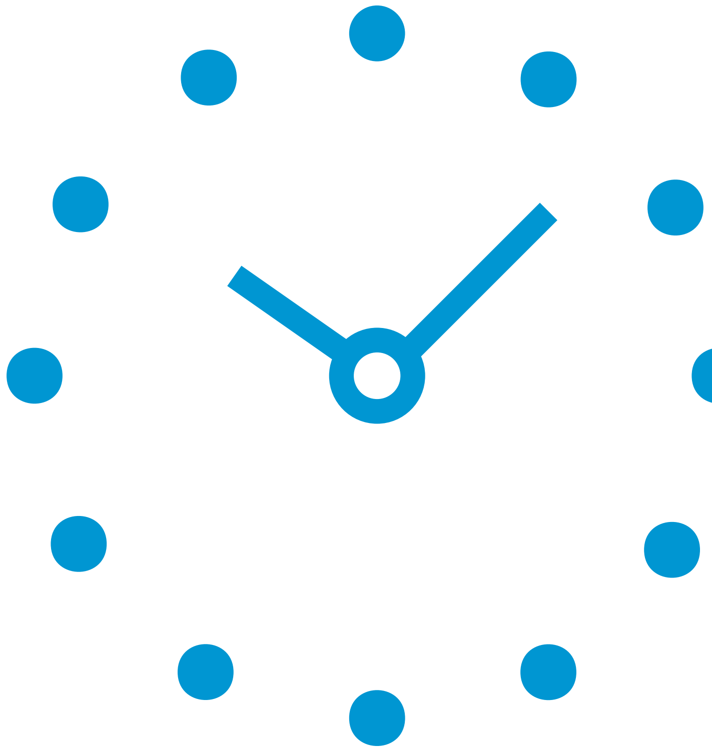
Working in sales is highly competitive and clinching a deal requires a great deal of skill. In North America, only 10% of sales professionals will deliver ROI and 40% will miss quota. There are, however, several key selling skills that, when properly refined, can give you the tools you need to sell effectively and meet your targets. Here are six critical selling skills that you need to hone now to be successful in sales in 2017.

1. PROSPECTING AND TIME MANAGEMENT SKILLS

Sales professionals are busy people who want to focus on generating revenue. It is understandable that you may sometimes feel tempted to bypass time-consuming prospecting and jump straight into calls. This is, however, a false economy since on average, it takes **eight calls** for a sales pro to reach a prospect and only 2% of cold calls result in an appointment. Prospecting skills are therefore key to effective time management in the long run.

Sort through leads to find those that are most promising. It's a good idea to use analytics to identify ideal leads based on industry, business size, etc. Importantly, learn when it's time to cut your losses; don't waste too much time on a deal that isn't going to close.

Done correctly, prospecting is always worth the time investment and will help you reap the rewards down the line.



"Sort through leads to find those that are most promising."

2. PRODUCT KNOWLEDGE AND RESEARCH SKILLS

"It is vital that, as a sales rep, you truly are a bonafide expert."

In today's marketplace, consumers are more knowledgeable than ever. With access to your website (and those of your competitors), online reviews and social media questioning, it's very possible that when you come into contact with a prospect, they may already have done some internet based research about your product or service.

It is vital that, as a sales rep, you truly are a bonafide expert. An expert not only about the product you are selling, but also about how your product or service stacks up against competitors and, importantly, an expert on how to advise a prospect how your product meets their needs.

Great research skills are imperative. Do your homework and be prepared in advance of calls. Create crib sheets with **value propositions** that demonstrate how your product is superior to your competitors. Set up **Google alerts** for other similar products on the market and update your these sheets regularly so you can be confident in your ability to answer any questions with a convincing and persuasive answer. Don't neglect to check LinkedIn and other social selling tools to give you an understanding of them as a person and their business needs.

Even with the greatest amount of research, however, there will be times when a prospect has a question for which you don't have an answer. Be authentic and transparent. Acknowledge that they've asked a really interesting/important question that you need to get back to them on and importantly, follow up with an answer as soon as possible.

3. QUALIFIED QUESTIONING SKILLS

After you've done your prospecting and research, you're on to the call/meeting itself. Here is where qualified questioning skills come into their own. A great sales rep starts off any conversation with insightful discovery questions that help inform their next steps and tactics. Don't jump straight into the features and benefits of your product. Your interaction must be more of a conversation than a traditional pitch.

Even if, from your prior research, you have an idea of what benefits will appeal, it's important to let your prospect talk and hear their needs. Qualified questioning about their company, their products, their need, their business plan and the problems they have encountered will inform your needs analysis and give you a chance to delve deeper into their true business pain and how your product can solve it.

Ask about budget, timeline, competition and their organizational purchasing process to get the information you need to clinch the deal.

"It's important to let your prospect talk and hear their needs."

4. ACTIVE LISTENING SKILLS

Part and parcel of qualified questioning is the ability to use active listening skills. It's one thing to ask a question; it's another to make use of the answer. As its name suggests, actively listening means just that: concentrating fully on what is being said.

Not truly listening to a prospect is one of the most fundamental mistakes you can make in sales. Yes, you have done research but if you let that alone inform your tactics you will likely miss out on key information that could be integral to making a sale. For example, perhaps you have made an incorrect assumption about why a client did not like a competitor and, without active listening, your proposal will miss this key component and mean you fail to make the sale.

More than just helping shape your strategy, active listening is important because people can usually tell if you're really listening to them. It's a complete turn-off to a potential client if they feel ignored or that you aren't really paying attention. Active listening then is vital to forming a rapport with prospects, as well as learning the information you need to sell effectively.

"Active listening is important because people can usually tell if you're really listening to them."

5. STRATEGIC THINKING AND OBJECTION HANDLING SKILLS

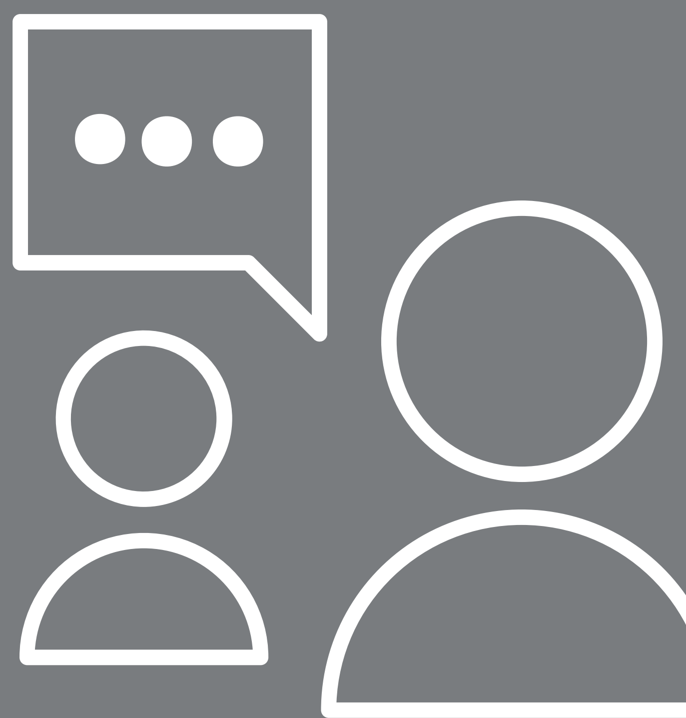
Before reaching out to a prospect, it's important to think strategically about the objections that might arise. Think "Objection Prevention" rather than just "Objection Handling".

As well as hypothesizing about potential objections, as you develop your sales pitch for a particular product, make a note of the actual objections that come up. Take these, find the ways to circumvent them, and add them to your arsenal. Crucially, you need to be proactive. Address common objections before the prospect brings them up and have your solution ready. Thus you'll preempt many objections before they even surface.

Naturally though, prospects will have some objections that you won't have been able to predict. Be prepared and ready to think on your feet. If you can call to mind actual data to back up your problem, even better. Whatever happens, use it as a learning experience, add the objection to your list and be ready for it next time.

"Address common objections before the prospect brings them up and have your solution ready."

6. COMMUNICATION AND EMPATHY SKILLS



Honing your communications skills is absolutely vital in making a sale. Obviously, your use of language, in both written and oral communications, should be grammatically correct and persuasive in nature. But effective communication skills are comprised of far more than simply the words that you use. In fact, according to **Sandler Sales Training,** 58% of communication effectiveness is down to body language and other non-verbals, 38% is down to tonality, and a mere 7% is down to what we actually say.

Therefore, to communicate effectively in a sales conversation you need to subtly match your prospect, and this is where empathy skills come into their own. Put yourself into their shoes and imagine their response to what you are saying, pay attention to body language (in face-to-face meetings) and speech closely to check your assumptions about how they will react. Always try to mirror a prospect's tone and style in terms of physical body language and way of talking. Match their level of formality and aim to build up a rapport.

You may or may not be already be using these six critical selling skills in your day to day sales interactions but, to truly master all of them will take time and practise. Start honing these skills today and you will no doubt see a significant improvement in your sales success as you grow in your career.

"To communicate effectively in a sales conversation you need to subtly match your prospect"

SECTION 4:

BUILDING RAPPORT & FOLLOW UP

Material:

- The Art of Establishing Rapport with Prospects
- Getting Facetime with Prospects and Clients
- Key Follow-Up Strategies to Keep your Prospect Engaged and Clients

Author: Canadian Professional Sales Association

With countless new sales tools and technologies, selling is becoming very scientific. However, building relationships will always be a critical part of sales, and that is truly an art. While each person has their own methods and personality, and these should be embraced, there are some tried and true techniques that will help you build a rapport with your prospects. Try these methods, build your skills, and you'll soon master the art of relationship-building.

Ask Questions Before You Start Selling

There is nothing prospects dislike more than an irrelevant sales pitch. In order to build a rapport and overcome your prospects' initial skepticism, begin by asking questions. Your questions should relate to the product or service you are selling, but also aim to put your prospect at ease and make them more comfortable.

Get to Know Your Prospects Personally

Personal relationships are stronger than professional ones, and so you will have a stronger connection with your prospects if you can build something resembling a friendship. Over the course of your calls and meetings with prospects, find out more about their interests, skills, and hobbies. If you are both fans of the same sport or team, for instance, you can use this mutual interest to build rapport and trust. Your prospect will be much happier to hear your sales opportunity if they feel a sense of comradery.

Really Listen to What They Tell You

There are a lot of negative stereotypes about sales people, and one of them is that sales people talk and talk but never listen. Don't be a statistic - listen to your prospects. Asking your prospects questions and getting to know them will not be effective methods of building rapport if you don't truly listen to them. Make notes after your meetings or calls so that you remember the things you learned, and review the information before you speak to this prospect again. This way, your listening will pay off long into the sales cycle.

Have Face to Face Meetings

Even though we have access to countless ways to communicate, there is still something about a face-to-face meeting that other communication methods really can't replicate. Instead of emailing or calling your prospects, book an in-person meeting. The relationship building you are able to do in a face-to-face meeting will establish a strong rapport with your prospects, and help you close the sale.

If you're sales relationships are lacking that extra level of trust and loyalty, it's likely because you need to build a stronger rapport with prospects. Use these tips to form that relationship and watch your sales numbers grow.

Author: Canadian Professional Sales Association

We all know that the more face time we get with prospects and clients the more chance we have of making and increasing sales. But getting those all-important face-to-face meetings can often prove elusive. If you find you're spending hours on the phone and still failing to get in front of your prospects, follow these tips to generate more meetings and boost sales.

Tip One: Branding is Key

If you still adhere to the old school of thought that brand is only a matter for marketing, think again. When prospects get a cold call from someone they've never heard of, talking about a company they know little about, they're unlikely to agree to a meeting. But building your personal brand changes things and is an important strategy for the 21st century sales pro. Use your online presence: social networks, blog posts and podcasts to build name recognition amongst your target customers. If they're familiar with your name and background because they've seen you on Twitter or LinkedIn, they're far more likely to agree to face time with you. Even better, if they've read something you've posted online and liked what you had to say it creates a sense of connection and they'll be far more open to what you have to say in the meeting itself.

Tip Two: Referrals Rule

It's clear that referrals work: according to hubspot, B2B buyers are five times more likely to engage with a sales pro if they've been introduced by someone they know and 84% of decision makers start the buying process with a referral. So how do you get these fast track tickets to a meeting? The short answer is, ask: Whenever you have a happy customer, ask them if they know anyone else looking for the solution you are offering. For other ways to increase your referrals, check out this article.

Tip Three: Get Social - In the Real World

While social media is a great tool for sales pros, nothing beats attending an industry event for actual face time and networking with clients. But the same rules for social selling applying in real life networking: don't go with a hard-sell approach. You need to come across as an industry expert, someone who has interesting and informative things to say, rather than just a sales pitch. If you manage to connect with a prospect at a networking event and make a great impression, a meeting will not be hard to secure. Networking not your forte? See how you can improve your networking results here.

Tip Four: Let Your Voice Sound Out

Even better than just attending an event is if you can secure a speaking gig. Give a great talk at an industry event and you've just positioned yourself as a trusted expert in a room full of people! On occasions like that, you'll find that people will naturally navigate towards you to pick your brain and follow up on what you've just spoken about. It's a great way to build your personal brand and make a ton of meetings. Another great way to get in front of your prospects is through podcasting. You don't need to go to the trouble of setting up your own show; making a guest appearance on an industry podcast is again a great way to let your prospects and clients get to know you better.

An effective follow-up is a key element of the sales process, but all too often salespeople lose the attention of their prospects after the initial pitch. Why? There are many reasons why you might lose engagement, but usually, it comes down to a lack of personalization and ineffective follow-up communications.

Do you, for instance, wait a few days then call your prospect to check in? Bad move. Think of this from their point of view- "check in"for what? Why should they return your call? If they're not ready to buy, this approach is at best lazy and at worst a major annoyance...

So what should you do? Read on to learn the key follow-up strategies you need to employ to keep your prospect engaged and, more importantly, keen to buy.

Personalize Your Follow-Up

Before we even get to the content of your follow-up, the first step is to make sure you are connecting with a prospect on their terms. During your exploratory questions, find out the best way to connect with them - is it by email, phone, text or maybe their favourite social network? This is important intel and will make it easier for you to connect with them, without annoying them, as you go forward. Also, you want to make sure that each time you connect with them, you are adding value, so keep track of their particular interests and concerns.

Have a Reason to Follow-Up

As mentioned above, you don't want to come across as an annoyance to your prospect so each time you contact them there better be a darn good reason. Here are some great reasons to call email that go beyond the boring "check in":

Answers to Questions:

In your initial phone call or meeting, it's often a good thing if you don't have all the answers on the spot as it's a great excuse for a welcome follow-up. Make sure you respond to unanswered questions quickly and effectively.

Personalized Content:

If you are using tools like Bigtincan or KnowledgeTree, they'll help you easily find relevant content that is tailored to your prospect and pique their interest. Then you can flip them a quick email, with a line like, "Thought you might be interested in this based on our last conversation and then follow up with a few days later to discuss the article in question. If you don't have access to those platforms, a simple Google alert can set you up for follow-up success in a similar way.

New Information:

A great way to get your prospect excited about your product or service is to be excited about it yourself. When there are changes, improvements or new features on offer, get in contact and share the good news. As always, be ready to explain how anything new can help them and their specific business and keep the call focused on them after the initial excitement.

Customer Testimonials or Case Studies:

These are important to share with prospects for obvious reasons, but again, keep it tailored and personalised. Make sure the testimonial or case study comes from a happy customer who had similar needs or interests as your current prospect.

Define Clear Next Steps

We all know that actually connecting with a prospect in the first place is a large part of the battle. So if you've managed to get so far as to have a meeting or call with a prospect, don't blow it by letting them go without having clearly defined next steps in place. Ask them at the end of any meeting or call to put a date in the calendar when you can reconnect. Don't let them off with an excuse that they'll get back to you after they've mulled it over or discussed it with their team. Say something like, "I know how busy you are, so let's put a date in the calendar now when we can continue this conversation after you've had a chance to think it over." Most people will find it difficult to say no when you pose something so politely and reasonably.

Understanding the Market

Prospecting Challenge: Become a Prospecting Expert

Instructions: Now that you have completed reading the articles, apply your knowledge and expertise by answering the following questions.

1. Which one of the questions below is NOT considered an information gathering prospecting question?

- ☐ With whom have you had success in the past?
- ☐ What is the usual process for implementing a new product or service like this?
- ☐ When can we close the deal?
- ☐ What challenge did you experience with that product?

2. Which of these questions below is likely to show your prospect that you are interested in developing trust and rapport?

- ☐ What's your most important priority currently and why?
- ☐ What would you like to see improved?
- ☐ What are your current pain points, and how can we help?
- ☐ All of the above

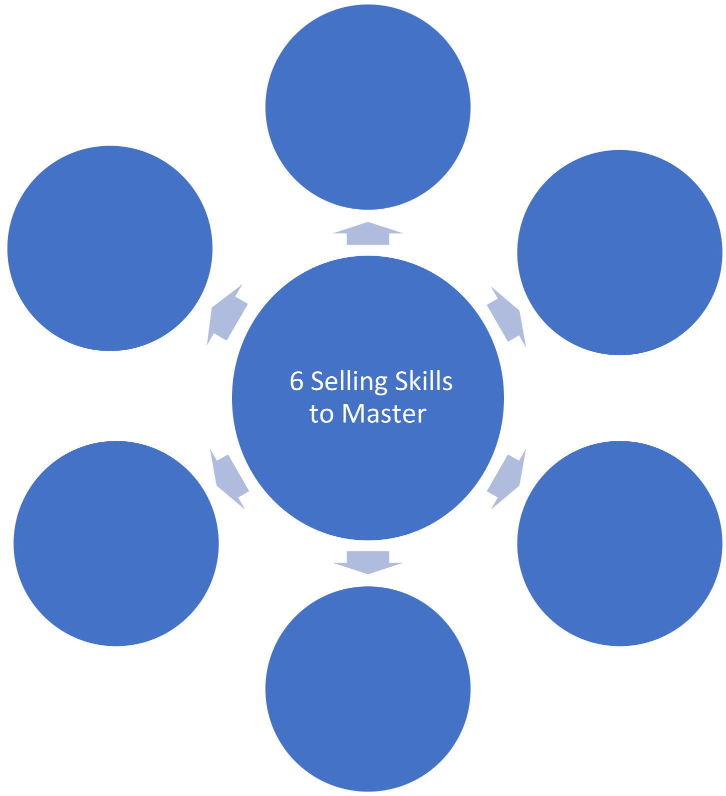
3. List and define 4 strategies that you should use to improve your telephone prospecting strategies. Then, list an example of how you would apply it.

Phone Prospecting Strategies	Example of How I Use it
1.	
2.	
3.	
4.	

Which of the four are you likely to <u>NOT</u> use? What steps can you take to improve your skills in this area?

Answer Key:
#1. C, #2.d, #3. I.e: Schedule a meeting while still on the phone, in order to prevent your prospect from missing your email request for a meeting .

4. List the 6 critical selling skills you need to improve your prospecting ROI.



5. When cold-calling a new prospect, it's easy to be ignored. What 2 strategies can you use to get that all important face-to-face meeting with your prospect?

Answer Key:
#1. C, #2.d, #3. I.e: Schedule a meeting while still on the phone, in order to prevent your prospect from missing your email request for a meeting, #4. Prospecting and time management skills, Product Knowledge and research skills, Qualified questioning skills, active listening skills, strategic thinking and objection handling skills, communication and empathy skills. #5. Use positive customer referrals, become a sales expert on social media.

6. Using the checklist below, check off any of the prospecting steps you already use when securing face-to-face meetings with your prospects. Is there an area that you need to develop? What steps can you take now to improve in this area?

- [ ] Personal branding: Online, social media presence; What will your clients see when they research your name or company?
- [ ] Referrals: 84% of decision makers start the buying process with a referral. Have you asked around?
- [ ] Social Media: Using your social media platforms to engage with your prospects and creating an online presence as an expert in your field is far likely to yield results.
- [ ] Networking Engagements: Speaking and attending industry events

Area that I need to work on: ____

Steps to improve:

____

____

____

Congratulations, You've just earned 3 PDUs!

Track your PDUs here.