**Guide for the seller**

This guide is designed to make it easier for the salesperson to use the knowledge, methodologies, and best practices of consultative selling in their day-to-day lives. It has been developed in a complete and comprehensive way to serve various sizes of companies, and companies of various market segments. You should use only the information that you deem pertinent to your company and your needs.

If you have any questions about using this guide, ask your instructor or ADVANCE consultants for help at [advance@advanceconsulting.com.br](mailto:advance@advanceconsulting.com.br) or (11) 3044-0867

**Forms for the seller**

[Sales Plan or Portfolio Plan Form (Territory Plan) 3](#_Toc136077531)

[War Plan Form 7](#_Toc136077532)

[Account plan form 8](#_Toc136077533)

[1-page Account Plan Form (account plan) 15](#_Toc136077534)

[Opportunity Plan Form 16](#_Toc136077535)

[Example of pains 18](#_Toc136077536)

[Alignment of vision between seller and buyer 19](#_Toc136077537)

[Elevator speech 19](#_Toc136077538)

[Discovery form 19](#_Toc136077539)

[Basic model of opportunity qualification 20](#_Toc136077540)

[Advanced model of qualification of opportunities 22](#_Toc136077541)

[Competitor mapping sheet 23](#_Toc136077542)

[Negotiation planning sheet 24](#_Toc136077543)

[Trading Planning Canvas 25](#_Toc136077544)

[Canvas for preparing a presentation 26](#_Toc136077545)

[9 Steps to Putting Together a Successful Presentation 27](#_Toc136077546)

[Client meeting preparation form 28](#_Toc136077547)

[Preparation form for the meeting with client (Sale of VALUE) 29](#_Toc136077548)

[Customer meeting registration form 30](#_Toc136077549)

[VALUE Speech Plan 31](#_Toc136077550)

[Self-assessment form - Step: Prospecting 32](#_Toc136077551)

[Self-assessment form - Step: Qualification 32](#_Toc136077552)

[Self-assessment form - Stage: Preparation of the competitive strategy 33](#_Toc136077553)

[Self-assessment form - Stage: Application of the competitive strategy 33](#_Toc136077554)

[Self-assessment form - Step: Sales actions 34](#_Toc136077555)

[Self-assessment form - Step: Meeting with client 34](#_Toc136077556)

[Self-assessment form - Step: Influence and negotiation 34](#_Toc136077557)

[Self-assessment form - Sale of VALUE 35](#_Toc136077558)

[Sales forecast - calculation of the closing probability rate 36](#_Toc136077559)

ADVANCE Consulting / Corporate Name: ADVANCE Marketing Ltda.

R. Afonso Bras 473 - 1 floor, 04511-011 Vila Nova Conceição, São Paulo / SP - Brazil

Phone: +55-11-3044-0867 / Email: advance@advanceconsulting.com.br / Web-site: www.advanceconsulting.com.br

**© 2002-2023, ADVANCE Marketing Ltd.**

All rights reserved and protected by Law 9.610 of 19/02/98.

No part of this book, without the prior written permission of ADVANCE marketing, may be reproduced or transmitted by any means: electronic, mechanical, photographic, recording, or any other.

20230527

# Sales Plan or Portfolio Plan Form (Territory Plan)

### Sell on the current customer base

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Sales target (annual $)** |  |  | **Number of closings (annual)** |  |
| **Sales target (monthly $)** |  |  | **Number of closings (monthly)** |  |
| **Average ticket** |  |  |  |  |

|  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | **M1** | **M2** | **M3** | **M4** | **M5** | **M6** | **M7** | **M8** | **M9** | **M10** | **M11** | **M12** |
| **# Prospected** |  |  |  |  |  |  |  |  |  |  |  |  |
| **# Qualified** |  |  |  |  |  |  |  |  |  |  |  |  |
| **# Proposals** |  |  |  |  |  |  |  |  |  |  |  |  |
| **# Closed** |  |  |  |  |  |  |  |  |  |  |  |  |

## Map of cross-sell and up-sell opportunities

|  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Map of opportunities** | **Relationship** | **Importance** | **Product1** | **Product2** | **Product3** |  | **Service1** | **Service2** |  | **Total opportunities** |
| Client1 | Good | Reference | or |  |  |  |  |  |  | **1** |
| Client2 | Medium | Important | Lim |  |  |  |  |  |  | **0** |
| Client3 | Weak | Relevant | cc |  |  |  |  |  |  | **0** |
| Client4 | map | Loyal | No |  |  |  |  |  |  | **0** |
| Client5 |  | map |  |  |  |  |  |  |  | **0** |
| Client6 |  |  |  |  |  |  |  |  |  | **0** |
| Client7 |  |  |  |  |  |  |  |  |  | **0** |
| Client8 |  |  |  |  |  |  |  |  |  | **0** |
| Client9 |  |  |  |  |  |  |  |  |  | **0** |
| Client10 |  |  |  |  |  |  |  |  |  | **0** |
|  |  |  |  |  |  |  |  |  |  |  |
| **Total opportunities** |  |  | **1** | **0** | **0** | **0** | **0** | **0** | **0** |  |

## Prioritization of the opportunity map

|  |  |
| --- | --- |
| **Offers with the highest number of opportunities** | **Strategy of action** |
|  |  |
| **Customers with the highest number of opportunities** | **Strategy of action** |
|  |  |
| **Customer groupings with opportunities** | **Approach strategy (cases, references, etc.)** |
|  |  |
| **Customers who will be laid off or "oxygenated"** | **Shutdown strategy** |
|  |  |

## Approach campaigns

Define how the approach will be made in each of the months

|  |  |  |
| --- | --- | --- |
| **January** | **February** | **March** |
|  |  |  |
| **April** | **May** | **June** |
|  |  |  |
| **July** | **August** | **September** |
|  |  |  |
| **October** | **November** | **December** |
|  |  |  |

### Selling in the current customer base - approach plan by segment

You should have a plan for each identified segment

**Goals and objectives you have for this segment**

|  |
| --- |
|  |

**Key Segment Issues and Value Proposition**

|  |  |
| --- | --- |
| **Segment Issues** | **Value Proposition** |
|  |  |
|  |  |

**Segment personas**

|  |  |  |  |
| --- | --- | --- | --- |
| Persona | Features | Concerns | Role in the purchase |
|  |  |  |  |
|  |  |  |  |

**Strategy to locate personas**

|  |
| --- |
|  |

**Approach strategy (what to talk about to get attention)**

|  |
| --- |
|  |

**Action plan for this segment**

|  |  |  |
| --- | --- | --- |
| **Share** | **Deadline** | **Accountable** |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

### Sell to new customers

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Sales target (annual $)** |  |  | **Number of closings (annual)** |  |
| **Sales target (monthly $)** |  |  | **Number of closings (monthly)** |  |
| **Average ticket** |  |  |  |  |

|  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | **M1** | **M2** | **M3** | **M4** | **M5** | **M6** | **M7** | **M8** | **M9** | **M10** | **M11** | **M12** |
| **# Prospected** |  |  |  |  |  |  |  |  |  |  |  |  |
| **# Qualified** |  |  |  |  |  |  |  |  |  |  |  |  |
| **# Proposals** |  |  |  |  |  |  |  |  |  |  |  |  |
| **# Closed** |  |  |  |  |  |  |  |  |  |  |  |  |

## Matrix of analysis and prioritization of segments

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | **Attribute weight** | **Segment1** | **Segment2** | **Segment3** |
| Number of customers |  |  |  |  |
| Importance of our solution |  |  |  |  |
| Volume of investments |  |  |  |  |
| Closeness |  |  |  |  |
| References and success stories |  |  |  |  |
| Regulatory impact |  |  |  |  |
| Expected growth in the market |  |  |  |  |

|  |  |  |
| --- | --- | --- |
| **Segment** | **Approach strategy** | **Choice of accounts** |
|  |  | Reference:  Important:  Relevant:  Easy Cherries: |
|  |  | Reference:  Important:  Relevant:  Easy Cherries: |
|  |  | Reference:  Important:  Relevant:  Easy Cherries: |

## Approach campaigns

Define how the approach will be made in each of the months

|  |  |  |
| --- | --- | --- |
| **January** | **February** | **March** |
|  |  |  |
| **April** | **May** | **June** |
|  |  |  |
| **July** | **August** | **September** |
|  |  |  |
| **October** | **November** | **December** |
|  |  |  |

### Selling to new customers - approach plan by segment

You should have a plan for each identified segment

**Goals and objectives you have for this segment**

|  |
| --- |
|  |

**Key Segment Issues and Value Proposition**

|  |  |
| --- | --- |
| **Segment Issues** | **Value Proposition** |
|  |  |
|  |  |

**Segment personas**

|  |  |  |  |
| --- | --- | --- | --- |
| Persona | Features | Concerns | Role in the purchase |
|  |  |  |  |
|  |  |  |  |

**Strategy to locate personas**

|  |
| --- |
|  |

**Approach strategy (what to talk about to get attention)**

|  |
| --- |
|  |

**Action plan for this segment**

|  |  |  |
| --- | --- | --- |
| **Share** | **Deadline** | **Accountable** |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

# War Plan Form

### Strategies of war

**To defend the territory (how not to lose money)**

|  |  |
| --- | --- |
| **What do we want to defend?** | **How are we going to defend?** |
|  |  |
|  |  |
|  |  |

**To expand the territory (how to bring in fast money)**

|  |  |
| --- | --- |
| **Where can we expand?** | **How are we going to expand?** |
|  |  |
|  |  |
|  |  |

### Identification of LOW HANGING FRUITS

|  |  |  |
| --- | --- | --- |
| **Where are we seeing LOW HANGING FRUITS?** | **What are the characteristics of these**  **LOW HANGING FRUITS?** | **How could we find other companies with the same characteristics?** |
|  |  |  |
|  |  |  |
|  |  |  |

### Search for short-term projects

|  |  |  |
| --- | --- | --- |
| **What do we want to sell?** | **What stories can we tell customers to spark buying interest?** | **Who are we going to tell these stories to?** |
|  |  |  |
|  |  |  |
|  |  |  |

### Short-term actions

|  |  |
| --- | --- |
| **A single priority:** |  |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **DRIP Action** | **DRIP Result** | **Deadline** | **Done**  **(Yes/No)** | **Done by**  **Deadline?** |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |

# Account plan form

|  |  |  |
| --- | --- | --- |
| **Customer** | **Account Manager** | **Date of completion** |
|  |  |  |

### Map of the client's market knowledge

**Characteristics of this market**

|  |
| --- |
|  |

**Trends in the market where the customer operates - what is impacting the market where the customer operates**

(politics, laws and norms, social aspects and economy, geography, vertical performance, technology, consumption habits)

|  |
| --- |
|  |

**History and expectation of market growth**

|  |
| --- |
|  |

### Customer Knowledge Map

**Company Overview**

|  |
| --- |
|  |

**Main products and services, and the VALUE that this customer generates for the market**

|  |
| --- |
|  |

**Key financial results and current and planned performance indicators**

|  |
| --- |
|  |

**Market position, market share and competitors of this client**

|  |
| --- |
|  |

**Key plans, objectives, strategies and challenges that this client has, and that we can help**

|  |
| --- |
|  |

**Top customer priorities for this year (or next year)**

|  |
| --- |
|  |

### Decision map and influence

**Organization chart (high level)**

|  |
| --- |
|  |

**Map of power**

|  |
| --- |
| Who's who, who buys what, who influences who  Who wins what, who loses what: |

**Map of relationships**

|  |
| --- |
| My relationship goals  \* What barriers do I need to eliminate:  \* What areas do I need to enter and by when:  List of executives to protect or expand the relationship  List of executives starting or developing the relationship  List of executives to track or cultivate the relationship |

**Competition map**

|  |
| --- |
| What are the competitors on that account, what have they already sold on the account, to whom, how are they seen, how does the customer compare us |

**Map of external influences**

|  |
| --- |
| What are the sources of external influence that affect the client: consultants, associations, government, shareholders ...  (who are the opponents, supporters and neutrals for our company) |

### Mapping of possible opportunities

**Our track record at this client including projects done and opportunities under discussion**

|  |  |
| --- | --- |
| **Projects done** | **Opportunities under discussion** |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |

**Map of pains, problems or needs**

|  |  |
| --- | --- |
| **Company area** | **Pains, problems or needs identified and demands declared by the customer** |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |

**Our strengths including differentials and VALUE we can offer to this client and potential opportunities**

|  |  |
| --- | --- |
| **Strengths, differentials and VALUE** | **Potential opportunities we could meet based on our strengths, differentiators and VALUE** |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |

**Mapping of possible solutions that could interest the customer**

(key perceived opportunities, including cross-selling and up-selling)

|  |  |
| --- | --- |
| **Possible solution (opportunity)** | **VALUE we offer to the customer** |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |

**Choice of 3 priority opportunities**

|  |  |  |
| --- | --- | --- |
| **Opportunity** | **Reason for choice** (strategic, financial, visibility, political importance, etc.) | **Expectation of investments** |
|  |  |  |
|  |  |  |
|  |  |  |

**Possibility of a BIG DEAL or BIG partnership (thinking outside the box)**

|  |
| --- |
|  |

### Objectives, strategies and need for resources

**Goals and objectives for this client**

|  |
| --- |
|  |

**Attraction or retention strategies**

|  |  |
| --- | --- |
| **Attraction strategy and signing in to a new account** | **Strategy to keep the customer satisfied (retention)** |
|  |  |

**Strategies for account expansion or search for new opportunities including cross-sell and up-sell**

|  |
| --- |
|  |

**Strategies to accelerate and win the opportunities that are in the funnel**

|  |
| --- |
|  |

**Main problems and obstacles identified and how to solve them**

|  |
| --- |
|  |

**Resources needed for the plan to succeed (people, financial investments, training, partnerships, etc.)**

|  |
| --- |
|  |

**Need for support from other areas (executive support, marketing, operations, customer service, support, etc.)**

|  |
| --- |
|  |

### Action plan

|  |  |  |  |
| --- | --- | --- | --- |
| **Main actions planned** | **Accountable** | **Deadline** | **🗹** |
| **January** | | |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
| **February** | | |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
| **March** | | |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
| **April** | | |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
| **May** | | |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
| **June** | | |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
| **July** |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
| **August** |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
| **September** |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
| **October** |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
| **November** |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
| **December** |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

### FOR THE EXCLUSIVE USE OF THE SELLER (A)

|  |  |  |
| --- | --- | --- |
| **Customer** | **Account Manager** | **Date of completion** |
|  |  |  |

|  |  |
| --- | --- |
| **Total sales last year** | **Total sales forecast for this year** |
|  |  |

**Our learning in this client including issued and unclosed proposals, and problems already faced**

|  |
| --- |
|  |

**Opportunities we should AVOID**

|  |
| --- |
|  |

**Identified opponents and relationship strategy**

|  |
| --- |
|  |

**Detailed map of the competition**

|  |  |  |  |
| --- | --- | --- | --- |
| **Competitor** | **VALUE they offer to the customer** | **Strengths** | **Vulnerabilities** |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

### Information We Still Need to Collect

|  |  |  |  |
| --- | --- | --- | --- |
| **Information** | **With whom to seek** | **Deadline** | **🗹** |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

# 1-page Account Plan Form (account plan)

|  |  |  |
| --- | --- | --- |
| **Customer** | **Account Manager** | **Date of completion** |
|  |  |  |

### Map of the client's market knowledge

|  |
| --- |
|  |

### Customer Knowledge Map

|  |
| --- |
|  |

### Decision map and influence

|  |
| --- |
|  |

### Mapping of possible opportunities

|  |
| --- |
|  |

### Objectives, strategies and need for resources

|  |
| --- |
|  |

### Action plan

|  |  |  |  |
| --- | --- | --- | --- |
| **Main actions planned** | **Accountable** | **Deadline** | **🗹** |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

# Opportunity Plan Form

|  |  |  |  |
| --- | --- | --- | --- |
| **Customer** | **Account Manager** | | **Date of completion** |
|  |  | |  |
| **Sales expectation (R$)** | | **Expected closing (date)** | |
|  | |  | |
| **Opportunity description** | | | |
|  | | | |

### Opportunity Map

**Map of the current situation or environment**

|  |
| --- |
|  |

**Pains, problems and needs identified or stated by the customer**

|  |
| --- |
|  |

**How these pains, problems and needs are impacting the customer**

|  |
| --- |
|  |

**Benefits and VALUE expected by the customer for the solution to be proposed**

|  |
| --- |
|  |

**Solution vision - products and services involved**

|  |
| --- |
|  |

### Map of relationships

|  |
| --- |
| Who's who, who's buying what, who's influencing whom. **Who wins what, who loses what:** |

|  |  |  |
| --- | --- | --- |
| **Name and function of sponsors** | **Behavioral and motivating style** | **Trading strategy** |
|  |  |  |

|  |  |  |
| --- | --- | --- |
| **Name and function of supporters** | **Behavioral and motivating style** | **Trading strategy** |
|  |  |  |

|  |  |  |
| --- | --- | --- |
| **Influencer names** | **Behavioral and motivating style** | **Trading strategy** |
|  |  |  |

|  |  |  |
| --- | --- | --- |
| **Name of opponents** | **Behavioral and motivating style** | **Trading strategy** |
|  |  |  |

**Competitors, their strengths and weaknesses, and our strategy of attack or defense**

|  |
| --- |
| Strategies: attack, flank, fragment, defend, develop, simulate |

### Map of the purchasing process

**Involvement of the purchasing department and negotiation strategy**

|  |
| --- |
|  |

### Objectives, strategies and need for resources

**Goals and objectives for this opportunity**

|  |
| --- |
|  |

**Strategy of action in this opportunity**

|  |
| --- |
|  |

**Need for resources, support from other areas of our company, and support from suppliers or partners**

|  |
| --- |
|  |

**Main problems and obstacles identified and how to solve them**

|  |
| --- |
|  |

### Action plan

**Plan of actions in this account with dates and responsible**

|  |  |  |
| --- | --- | --- |
| **Share** | **Accountable** | **Deadline** |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

# Example of pains

|  |  |
| --- | --- |
| Market segment: Manufacturing | |
| Position | Main Pains |
| CEO (Chief Executive Officer) | * Lose market share * Not meeting shareholder expectations * Decreased profitability * Decrease in the company's value per share |
| COO (Chief Operating Officer) | * Inconsistent quality * Increased payroll cost * Increased cost of production * Not meeting current customer demand * Decrease in operating profit * Not meeting productivity goals |
| CFO (Chief Financial Officer) | * Delays and inaccuracy in reports * Cash flow issues * Decreased return on investment * Decreased return on asset |
| CIO (Chief Information Officer) | * Not meeting current user demand * Not having a long-term strategy * Difficulty keeping up to date with the constant evolution of technology * Difficulties in integrating the various systems |
| Vice President of Manufacturing | * Delays in the production and delivery of products * High inventory levels * Difficulties in meeting the constant changes in legislation * Lack of capital for investment * Increased equipment maintenance |
| Vice President of Marketing | * Decrease in market share * Unplanned increase in expenses * Low return on marketing campaigns |
| Vice President of Sales | * Lower-than-expected sales results * Increased cost of sales * Lack of accuracy in the "forecast" * Not meeting sales planning |

Source: The New Solution Selling

# Alignment of vision between seller and buyer

There are various anxieties, doubts and fears on both the seller's side and the buyer's side. The relationship of trust has to be built step-by-step. In the table below we have the vision of each of the sides, and how to identify if the initial contact will be your sponsor within the client.

|  |  |
| --- | --- |
| Seller's activities | Buyer Perspective/Decision |
| **Step 1 - establish harmony with the customer** | * Do I even want to hear what this salesperson has to say? |
| **Step 2 - start the conversation. Communicate:**   * The objectives of the link * Elevator speech | * Is this salesperson different from other sellers? * Is he sincere? Is he competent? * Do I want to share my information with him? |
| **Step 3 - Help the client admit the pain**   * Ask "situation questions" if necessary * Ask questions that encourage the client to think about their pain * Tell success stories and check if the customer identifies himself * Prioritize admitted pains | * Do I want to admit the critical aspects of my business? |
| **Step 4 - Development of needs, the customer's purchase vision**   * Diagnose/create a solution view based on the products you offer, or * Re-engineer the vision with the differentials of your company   + Become an integral part of the customer's vision   + Present the differentials   + Determine the fundamental pains (if not already admitted) | * Does this salesperson really understand the reasons that led me to this critical situation? * Do I agree with his diagnosis? * Should I discuss the impact of this pain with others? * Do I agree that the company has the capabilities presented and the value established in the seller's speech? * Do I want to be responsible for solving this problem? |
| **Step 5 - Get agreement to move forward**   * Measure the desire to go ahead | * Am I really sure I want to go ahead with this? * Am I prepared to take this to whoever will approve? |
| **Step 6 - Determine the ability to buy**   * "Let's say you convince yourself that you can have all the advantages and benefits that we've talked about here and you really want to buy our solution, what would be the next steps?" | * Should I reveal the decision and approval process? |
| **If the buyer does not have decision-making power:**  **Step 7a: Get access to the decider**   * "If we proved to you all the advantages and benefits of our solution, would you introduce us to whom you will decide?"   + If the buyer will make the presentation, then write the "Sponsor's Letter"   + If the buyer will not make the presentation, then you will have to look for another sponsor | * Do I really want to be the sponsor of this company if it shows that it has the capacity to serve us? |
| **If the buyer has decision-making power:**  **Step 7b: Qualify the purchasing process**   * "How would you like to evaluate our solution?"   + What legal, technical, or administrative approvals will be required?   + What is the process of the proposal?   + Need prior review of the proposal? | * Do I really want to reveal what the buying process will be? * Do I agree with the definition of the proposal? |

Source: The New Solution Selling

# Elevator speech

|  |  |
| --- | --- |
| Impact sentence |  |
| Enterprise |  |
| Products and services |  |
| Credentials and differentials (company positioning)  References and success stories |  |
| Benefits (VALUE) for the customer |  |

# Discovery form

|  |  |  |  |
| --- | --- | --- | --- |
| LEAD Rating: | •green | •yellow | •red |

|  |  |
| --- | --- |
| **Enterprise** |  |
| **Contact** |  |
| **Telephone** |  |
| **Email** |  |

**Discovery**

|  |  |
| --- | --- |
| **Filtering** | What current solution does he use?  How satisfied is the current situation? Note 0 to 10 |
| **Situation** | Number of branches, numbers of boxes, number of servers, etc. |
| **Challenges** | What is driving this customer to consider acquiring a new solution?  What does he hope to solve the problem?  What are the unmet needs? |
| **Cause and implication** | What is the cause of the customer's problem or need?  What impacts is the problem or need having on the customer? |
| **Benefits and VALUE** | What does the customer expect from a solution? |

**What led you and put this color code on this client (green, yellow or red)?**

|  |
| --- |
|  |

**Additional notes**

|  |
| --- |
|  |

# Basic model of opportunity qualification

### Questions about existing solution, i.e. the customer already has a supplier

|  |  |
| --- | --- |
| S | **Situation**  **Goal**: to have a sizing to know if the customer is minimally interesting for your company  **Examples**:   * Number of employees, number of computers, number of branches * Current consumption (datacenter, digital marketing, ERP solution, etc.) * Expected growth |
| F | **Filter**  **Objective**: to know if the customer would be interested in changing suppliers  **Examples**:   * What is your supplier? On a scale of 1 to 5, how satisfied are you with your current supplier? * What would you like to have that your current vendor doesn't? Would you be willing to listen to another vendor's proposal? |

### BANT Qualification Questions

|  |  |
| --- | --- |
| B | **Budget**  **Objective**: To know what is the approved or planned budget for the project?  **Examples**:   * Is there already an approved or pre-approved budget for this project? * In your company, what is the process to approve a budget for a project like this? * We have 3 alternatives to meet this project: We have a "Basic" solution that goes from R $ 10 to 12 thousand. We offer this solution for small businesses and I don't think it would meet the minimum requirements of your project. We have a "Professional" solution that goes from R $ 50 to 70 thousand that I believe is the most suitable for your company and for your project. And we have an "ADVANCED" solution that goes from R $ 200 to 250 thousand with all the resources available. Of these 3 alternatives, which do you think would best fit your investment expectation? |
| The | **Authority**  **Objective**: to discover the decision and approval process (documentary process), map of pains, map of power and influences, and who will be your sponsor (Champion)  **Examples**:   * In your company what is the process of decision and approval of a project like this? * Would it be possible to have a quick meeting with the person who will make the decision on the project? This is part of the process of opening a business in my company. It will only be 5 minutes for a handshake. * What would be your participation in the decision-making and approval process of a project like this? * Will the purchasing department be involved in the process? |
| N | **Need, pain or problem**  **Objective**: use the list of pains and discover the need, pain or problem BUSINESS (business drivers) that the customer is seeking to solve, or the possibility of creating the need in the customer. Identify possible solutions that map to the customer's NEED.  **Examples**:   * Is there any determining event that is guiding this project, for example, some modification in the legislation, a requirement of its matrix, a request from the user area? * What is motivating your company to pursue a project like this? * We have some clients, similar to your company, who have been able to reduce operating costs by 10% by using technology to integrate the manufacturing process with the financial one. Would your company be interested in this type of project? * What do you hope to get from results with this project? What's your goal? |
| T | **Time**  **Objective**: to identify the client's urgency for the project  **Examples**:   * Is there a set date or deadline for this project? * We have 3 alternatives to meet this project, with teams of different sizes and, of course, different impacts on investment. We could deliver in 30, 90 or 120 days. Could you wait 120 days? |

### Questions about competitors

|  |  |
| --- | --- |
| C | **Competition**  **Goal**: Find out who are the competitors who will participate in the process  **Examples**:   * Has any other company ever come here to offer a similar solution? * Do you know of any other companies that provide a similar solution? * What caught your attention in these companies that have a similar solution to ours? * What caught your eye in our company or our solution? |
| S | **Selection Criteria**  **Objective:** to find out what are the most important criteria in the selection of the solution  **Examples:**   * Do you already have a list of the criteria you will use to select a solution? * What are the top 3 criteria you will use to select the solution? * Creating a list of selection criteria is a complex task. Can we help them with this? * Within the criteria that you will use to select the solution, where is the question "price"? What other questions and weights will be given to each one? * Between "price", "quality" and "delivery time", what will be the most relevant criterion for the selection of the solution? Are there other criteria? |

# Advanced model of qualification of opportunities

**Pain x Power x Vision x Value x Control = Sale**

|  |  |  |
| --- | --- | --- |
| **Customer** | **Account Manager** | **Date of completion** |
|  |  |  |

|  |  |
| --- | --- |
| **Sales expectation (R$)** | **Status** |
|  | ( ) Latent ( ) Looking for solution |

|  |
| --- |
| **Opportunity description** |
|  |

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
|  |  | Have? | | Notes | | | |
|  |  | Yes | No | Our company | Contestant 1 | Contestant 2 | Contestant 3 |
| \* | Pain - Will the customer buy? |  |  |  |  |  |  |
| 1 | Have we identified a potential or high-priority pain? |  |  |  |  |  |  |
| 2 | Do we validate the pain with the buyer (or owner of the pain)? |  |  |  |  |  |  |
| 3 | Do we understand how others are impacted by pain? |  |  |  |  |  |  |
| 4 | Is there an approved budget? |  |  |  |  |  |  |
| 5 | Is there a timeline for the project? |  |  |  |  |  |  |
| \* | Power – Are we aligned with the right people? |  |  |  |  |  |  |
| 6 | Do we understand the role of key people in this opportunity? |  |  |  |  |  |  |
| 7 | Do we understand who will influence the decision and how? |  |  |  |  |  |  |
| 8 | Are we connected with the people who will decide? |  |  |  |  |  |  |
| 9 | Do we have the support of key people? |  |  |  |  |  |  |
| 10 | Are we connected with people with access to the budget? |  |  |  |  |  |  |
| \* | Vision - Does the customer prefer our solution? |  |  |  |  |  |  |
| 11 | Do we help establish the initial requirements of the project? |  |  |  |  |  |  |
| 12 | Does our solution meet customer needs? |  |  |  |  |  |  |
| 13 | Do we create or re-engineer a differentiated vision for key people? |  |  |  |  |  |  |
| 14 | Do key people support our proposed solution? |  |  |  |  |  |  |
| \* | Value - Does our solution provide value to the customer and to our company? |  |  |  |  |  |  |
| 15 | Do we understand what the benefits will be for each key person and the company? |  |  |  |  |  |  |
| 16 | Have key people quantified and expressed to our company the benefits of our solution that we are offering? |  |  |  |  |  |  |
| 17 | Is there agreement in the analysis and proposal of the benefits? |  |  |  |  |  |  |
| 18 | Does the benefits proposal ensure that we have access to the budget? |  |  |  |  |  |  |
| 19 | Are there benefits to our company in winning this opportunity? Is it profitable? Is it strategic? |  |  |  |  |  |  |
| \* | Control - Can we speed up the purchasing process? |  |  |  |  |  |  |
| 20 | Do we understand the decision process and the criteria established by the client? |  |  |  |  |  |  |
| 21 | Do we understand the requirements of demand and satisfaction of key people? |  |  |  |  |  |  |
| 22 | Do we understand this client's purchasing practices, policies and procedures? |  |  |  |  |  |  |
| 23 | Has the client agreed to do an evaluation process with our company? |  |  |  |  |  |  |
| 24 | Can we speed up the evaluation process? |  |  |  |  |  |  |
| 25 | Can we successfully manage our risk? |  |  |  |  |  |  |

Source: The New Solution Selling

Caption for notes:

1 - Weak 2 - Medium 3 - Good

Should we strive to win this opportunity?

( ) Yes ( ) No

# Competitor mapping sheet

|  |  |
| --- | --- |
| Contestant name |  |

|  |
| --- |
| **Brief description of the competitor** |
|  |

|  |  |
| --- | --- |
| **Competitor's strengths** | **How to minimize competitor strengths** |
|  |  |

|  |  |
| --- | --- |
| **Competitor's weaknesses** | **How to use the competitor's weaknesses**  (use in association with our strengths) |
|  |  |

|  |
| --- |
| **Recommended strategy to attack or defend against this competitor** |
|  |

|  |
| --- |
| **Recommended speech to attack or defend yourself from this competitor** |
|  |

|  |
| --- |
| **Additional notes** |
|  |

# Negotiation planning sheet

|  |  |
| --- | --- |
| About our part of the negotiation | Analysis on the other party |
| What do we want? | What do they want? |
| Why are we negotiating with this client? What does he have that we want? | Why is this client negotiating with us? What do we have that he wants? |
| How desperate are we for this customer? | How desperate are they for us? |
| What alternatives do we have? | What alternatives do they have? |
| How far can I go (concessions)? | How far do I think they can go (concessions)? |
| What are we going to ask for in exchange for the concessions? | What will they ask for in exchange for the concessions? |

## Competitors

|  |
| --- |
| Who are the competitors? What are their weaknesses and strengths? What would their strategy be? |

## Strategy

|  |
| --- |
| What should be our strategy for this negotiation? |

# Trading Planning Canvas

|  |  |  |  |
| --- | --- | --- | --- |
|  | **What we're going to do** | **What we expect them to do** | **Strategy for the stages of negotiation** |
| **Alternatives** |  |  | **Aperture**  **Solution**  **Closure**  **Relationship** |
| **Interests** |  |  |
| **Options** |  |  |
| **Legitimacy** |  |  |
| **Commitments** |  |  |
| **Communication** |  |  |
| **Relation** |  |  |

**Interested parties in the negotiation**

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Name** | **Position or function** | **PD** | **GI** | **NR** | **PC** | **AM** | **Motivators and emotions** | **Investigation and mapping** |
|  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |

# Canvas for preparing a presentation

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Supplementary material** | **Design strategy** | **Communication strategy** | **Time** | **Goals** |
| **Context**  Market  Customer  Competitor |
| **Risk analysis and alternatives** | **Agenda** | **Key message** |
| **Flow strategy** |
| **Key question** |

**Participants of the presentation**

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Name** | **Position or function** | **PD** | **GI** | **NR** | **PC** | **AM** | **Motivators and emotions** | **Audience benefits** |
|  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |

# 9 Steps to Putting Together a Successful Presentation

|  |  |  |
| --- | --- | --- |
| **Slide** | **What** | **How** |
| 1 | Presentation cover  Icebreaker and rapport (empathic relationship) | Take advantage of the cover slide to make some icebreaker and establish an empathetic relationship. You can talk about something about the market, about some news or news you have seen, or ask some question to the participants. |
| 2 | Personal presentation | You have to establish the first level of customer trust – which is to have the trust in you. The client has to understand that you have the knowledge and credentials necessary to be presenting. |
| 3 | Agenda | Show the topics you will present by making clear the line of reasoning and the flow you will use in the presentation.  Don't forget to ask the client if the schedule makes sense for them and if you can follow through with this agenda. |
| 4 | The market | Include a slide talking about the customer's market, a novelty or a trend linked to the CHALLENGE that you will present in the next slide. The key point here is to show that you know THE MARKET and can make recommendations for the client's business. This is where you'll start **to ARTICULATE VALUE**  The end of this slide is an excellent time for **UNDERSTANDING CHECKING** and **EMOTIONAL CHECKING**. |
| 5 | THE CHALLENGE | Show the customer the challenges you have identified in the company (pains, problems or needs). Make it clear how you got this information and take the opportunity to "show your **NETWORK OF RELATIONSHIPS"**  Here it is essential to do the **UNDERSTANDING** CHECK and **EMOTIONAL CHECK** on the challenges presented. |
| 6 | The solution | You have to establish the second level of customer trust – which is in the solution. Beware of the technical level of the presentation. |
| 7 | Success stories and benefits | Which companies already use this solution?  What benefits did they have?  What would these benefits mean for the company you're introducing?  Show **NUMBERS**.  It is on this slide that you will win or lose your customer. |
| 8 | Your company | You have to establish the third level of customer trust – which is in the company you represent. Talk about the company and why the customer should buy from it  The end of this slide REQUIRES **UNDERSTANDING CHECKING** and **EMOTIONAL CHECKING**. You have to have the customer's "agreement" on top of everything that has been presented BEFORE showing the next steps. |
| 9 | Next steps | Present a suggestion of next steps to the client - with dates and responsible.  Do not forget that your goal is to sell, that is, to sign the contract. Then it tends to put the dates until the signing of the contract. Your goal is for the client to agree on the dates.  Be creative and put arguments to **CREATE A CONSTRUCTIVE TENSION** and **SHORTEN THE SALES CYCLE** |

# Client meeting preparation form

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Expected customer attendees in the meeting** | **Position or function** | **GI** | **NR** | **ST** | **PC** | **AM** |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |

**Objectives of the meeting**

|  |
| --- |
|  |

**What to consider as success for you or your company in this meeting?**

|  |
| --- |
|  |

**Strategy for the meeting and to achieve your goals**

|  |
| --- |
|  |

**Meeting agenda and roadmap**

Please describe the topics that will be discussed with their respective time

|  |
| --- |
|  |

**If you don't achieve success, what alternative plans will you use?**

|  |
| --- |
|  |

**Main possible precautions and unforeseen events**

|  |
| --- |
|  |

**Material to take to the meeting**

|  |
| --- |
|  |

**Brief history of acting in this client**

|  |
| --- |
|  |

GI = Degree of Influence (**D**ecisor, **Ap** rovador, **Av** aliador, **U**suário, **I**nfluenciador, **P**atrocinator)

NR = Relationship level (**E**xcelente, **B**om, **N**eutro, **R**uim)

ST = Status (**M**entor, **A**poiador, **N**eutro, **O**positor)

CP = Behavioral profile (CE=Catalyst/Expressive, **AA**=Friendly Supporter, **AM**=Analytical/Thorough, **CR**=Controller/Achiever)

AM = Adaptability to changes (**I**novator, **V**isionary, **P**ragmatic, **C**onservator, **L**ento)

# Preparation form for the meeting with client (Sale of VALUE)

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Expected customer attendees in the meeting** | **Position or function** | **GI** | **NR** | **ST** | **PC** | **AM** |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |

**Objectives of the meeting**

|  |
| --- |
|  |

**What will you articulate of VALUE to the customer? And how will you articulate the VALUE?**

|  |
| --- |
|  |

**How will you show that you have engaged decision-makers, influencers and other stakeholders?**

|  |
| --- |
|  |

**How will it shorten the sales cycle? How will CONSTRUCTIVE TENSION be used?**

|  |
| --- |
|  |

**What to consider as success for you or your company in this meeting?**

|  |
| --- |
|  |

**Strategy for the meeting and to achieve your goals**

|  |
| --- |
|  |

**Meeting agenda and roadmap**

Please describe the topics that will be discussed with their respective time

|  |
| --- |
|  |

**If you don't achieve success, what alternative plans will you use?**

|  |
| --- |
|  |

**Main possible precautions and unforeseen events**

|  |
| --- |
|  |

**Material to take to the meeting**

|  |
| --- |
|  |

**Brief history of acting in this client**

|  |
| --- |
|  |

GI = Degree of Influence (**D**ecisor, **Ap** rovador, **Av** aliador, **U**suário, **I**nfluenciador, **P**atrocinator)

NR = Relationship level (**E**xcelente, **B**om, **N**eutro, **R**uim)

ST = Status (**M**entor, **A**poiador, **N**eutro, **O**positor)

CP = Behavioral profile (CE=Catalyst/Expressive, **AA**=Friendly Supporter, **AM**=Analytical/Thorough, **CR**=Controller/Achiever)

AM = Adaptability to changes (**I**novator, **V**isionary, **P**ragmatic, **C**onservator, **L**ento)

# Customer meeting registration form

|  |  |
| --- | --- |
| **Enterprise** | **Date of the meeting** |
|  |  |

|  |  |  |
| --- | --- | --- |
| **Name of participants** | **Position or function** | **Enterprise** |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

**Objectives of the meeting**

|  |
| --- |
|  |

**Map of the situation or environment found**

|  |
| --- |
|  |

**Pains, problems or needs identified and demands declared by the customer**

|  |
| --- |
|  |

**How these pains, problems and needs are impacting the customer**

|  |
| --- |
|  |

**Benefits and VALUE expected by the customer for the solution to be proposed**

|  |
| --- |
|  |

**What solutions are presented?**

|  |
| --- |
|  |

|  |  |  |
| --- | --- | --- |
| **Next steps** | **Accountable** | **Deadline** |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

# VALUE Speech Plan

|  |  |
| --- | --- |
| **Enterprise** |  |
| **Contact** |  |

|  |  |
| --- | --- |
| **Profile, motivators and fears** |  |
| Behavioral profile |  |
| Profile motivators |  |
| Personal motivators |  |
| Professional motivators |  |
| Economic or financial motivators |  |
| Typical profile fears |  |
| Typical fears of the position |  |
|  |  |
| **Contact Concerns** |  |
| Goals and objectives |  |
| Performance indicators |  |
| Strategic concerns |  |
| Tactical concerns |  |
|  |  |
| **Preparation of the speech** |  |
| Success stories to present |  |
| Market information |  |
| Mapping of the professionals involved in the process |  |
| Strengths and differential to present |  |
| Possible objections |  |
|  |  |
| **How to establish credibility** |  |
| In the seller |  |
| In the solution |  |
| Company |  |
|  |  |
| **How to articulate VALUE** |  |
| Heating |  |
| Reframing |  |
| Rational immersion |  |
| Emotional immersion |  |
| VALUE Proposition |  |
| The solution |  |
|  |  |
| **How to create and use the network of relationships** |  |
| Who to talk to |  |
| What to talk about |  |
| How to communicate to the decision-maker |  |
|  |  |
| **How to shorten the sales cycle** |  |
| Who to talk to |  |
| What to talk about |  |

# Self-assessment form - Step: Prospecting

|  |  |
| --- | --- |
| **Seller Evaluation** | **Yes/No** |
| The seller identified if the caller was the right person for the matter |  |
| The seller has identified at least ONE OPPORTUNITY |  |
| The seller has established an empathetic relationship ("rapport") with the customer |  |
| The salesman asked and listened intently. The salesperson spoke less than the customer |  |
| About the methodology, the seller |  |
| 1) Used the elevator speech in a clear way and arousing interest about the company |  |
| 2) Used references to attract curiosity about the phone call (contact) |  |
| 3) Used an efficient way to break the ice |  |
| 4) Showed the client that he had knowledge about his company or about him |  |
| 5) Awakened the need in the client with "causos" |  |
| 6) Asked closed-ended questions to confirm understanding of what the client was saying |  |
| The seller has identified the customer's pain, problem, or need |  |
| The salesperson managed to get the customer to agree to the pain, problem or need identified (explain the pain) |  |
| About the preparation, the seller |  |
| He showed that he had studied the client's company |  |
| Put together a script with the questions to be asked |  |
| He thought and was prepared for possible unforeseen events |  |

# Self-assessment form - Step: Qualification

|  |  |
| --- | --- |
| **Seller Evaluation** | **Yes/No** |
| The salesman asked and listened intently. The salesperson spoke less than the customer |  |
| About the methodology, the seller |  |
| 1) Correctly opened the meeting by explaining the purpose of the qualification and getting approval to continue |  |
| 2) It has obtained elements that allow us to judge whether we can compete, can and want to win, and whether we can deliver |  |
| 3) Got the answers needed for BANT (Budget, Authority, Need, Time) |  |
| 4) Identified the determining event |  |
| 5) Identified pain, intensity and pain map |  |
| 6) Got the necessary answers from SPIN (Situation, Problem, Implication, Need Pay-off) |  |
| 7) Found out if the customer is talking to a competitor about the topic |  |
| 7) Correctly made the "check-points" to confirm the understanding of what the customer was saying |  |
| 8) Correctly read the customer's "signals" |  |
| 9) Asked questions to establish a relationship of trust |  |
| The salesperson managed to get the customer to agree to the pain, problem or need identified (explain the pain) |  |
| The seller identified the Decision Maker and had access to it or obtained a commitment to access it during the next phases |  |
| About the preparation, the seller |  |
| He showed that he had studied the client's company and put together a script with the questions to be asked |  |
| He thought and was prepared for possible unforeseen events |  |

# Self-assessment form - Stage: Preparation of the competitive strategy

|  |  |
| --- | --- |
| **Seller Evaluation** | **Yes/No** |
| The salesman asked and listened intently. The salesperson spoke less than the customer |  |
| About the methodology, the seller |  |
| 1) Correctly opened the meeting by explaining the purpose of the meeting and getting approval to continue |  |
| 2) Confirmed the elements to judge if we can compete, can and want to win, and if we can deliver |  |
| 3) Correctly identified the selection and purchase criteria |  |
| 4) Correctly mapped the situation (knowledge, power, relationships, external influences and solutions) |  |
| 5) Identified who will participate in the purchasing process and the profile of the participants |  |
| 6) Correctly identified the competitor's situation within the client |  |
| 7) Properly established the competitive strategy (attack, flank, fragment, defend, develop, bleed) |  |
| 8) Identified the traps planted by competitors |  |
| 9) Validated the competitive strategy with professionals of your company or with "sponsors" within the client |  |
| 10) Established and used partnerships and alliances to strengthen its position |  |
| 11) Correctly made the "check-points" to confirm the understanding of what the customer was saying |  |
| 12) Validated with the "sponsor" how it can be used in the purchasing process |  |
| The seller was able to articulate the value of the solution and differentials through the competitive situation, and validated with the customer |  |
| The salesperson showed that he had studied the customer's company and put together a script with the questions to be asked |  |
| The seller knew how to extract the information from the "sponsor" without hurting ethical rules or unnecessarily exposing the customer |  |

# Self-assessment form - Stage: Application of the competitive strategy

|  |  |
| --- | --- |
| **Seller Evaluation** | **Yes/No** |
| About the methodology, the seller |  |
| 1) Correctly opened the meeting by explaining the purpose of the meeting and getting approval to continue |  |
| 2) Adequately presented their knowledge about the company and the need |  |
| 3) You have shown that you know the competition |  |
| 4) Properly used the information on purchase criteria |  |
| 5) Properly used maps (knowledge, power, relationships, external influences, and solutions) |  |
| 6) Properly used the profile of the participants, involving everyone in the meeting |  |
| 7) Properly addressed the competition showing the value of your solution and competitive differentials |  |
| 8) Laid the traps planted by the competitors and planted some for them |  |
| 9) Correctly used "sponsor" |  |
| 10) Used partnerships and alliances to strengthen its position |  |
| 11) Correctly made the "check-points" to confirm the understanding of what the customer was saying |  |
| The seller correctly read the "signs" of the participants |  |
| The seller validated whether the participants agreed with the competitive advantage presented |  |
| The salesperson correctly ended the meeting, asking for feedback from the participants and getting information about the new competitive situation |  |

# Self-assessment form - Step: Sales actions

|  |  |
| --- | --- |
| **Seller Evaluation** | **Yes/No** |
| About the methodology, the seller |  |
| 1) Correctly opened the meeting by explaining the purpose of the meeting and getting approval to continue |  |
| 2) Presented himself properly creating credibility in the seller |  |
| 3) Properly presented the elevator speech creating credibility in the company |  |
| 4) Adequately presented the "admitted pain" (recognized need) by the client  We use the term "situation presented by the client" |  |
| 5) Used the 9-block diagram to take the client from "admitted pain" to the "solution view" |  |
| 6) Used PERSUASION (verbal, facial and body communication) to "create magic" by seducing the client |  |
| 7) Validated if the vision of the solution presented met the customer's expectations |  |
| 8) Validated with the customer if they could evolve into a solution demonstration or POC (proof of concept) |  |
| 9) Validated with the customer if they could send a proposal based on the vision of the solution |  |
| 10) Validated with the client if he could analyze a pre-proposal before the delivery of the final proposal |  |
| 11) Re-validated with the client the selection criteria |  |
| 12) Validated with the customer the purchasing process, once the proposal was received |  |
| 13) Correctly made the "check-points" to confirm the understanding of what the customer was saying |  |
| The seller closed with a schedule of actions stipulating dates for the decision and approval process |  |

# Self-assessment form - Step: Meeting with client

|  |  |
| --- | --- |
| **Seller Evaluation** | **Yes/No** |
| About the methodology, the seller |  |
| 1) Used an efficient way to break the ice |  |
| 2) Correctly opened the meeting by explaining the purpose AND AGENDA of the meeting and getting approval to continue |  |
| 3) If a previous meeting took place, then you correctly made the "link" between the two meetings |  |
| 4) Adequately presented the elevator speech |  |
| 5) He showed that he had prepared the meeting, having a script to follow |  |
| 6) Presented the solution in a convincing way, showing the benefits to the customer and competitive differentials |  |
| 7) Involved all participants of the meeting, making it clear that the solution brings benefits to each of them |  |
| 8) Validated if the solution presented met the customer's expectations |  |
| 9) Correctly made the "check-points" to confirm the understanding of what the customer was saying |  |
| 10) Prepared the closing of the meeting with a "recap" (points covered in the meeting) |  |
| 11) Established the next steps with dates and responsible |  |
| The salesperson left the meeting certain of their success, that is, that the solution meets the customer's expectations |  |
| The seller established a good "brain tune" with the participants |  |

# Self-assessment form - Step: Influence and negotiation

|  |  |
| --- | --- |
| **Seller Evaluation** | **Yes/No** |
| About the methodology, the seller |  |
| 1) Used the "warm-up" to identify if the other competitors had already presented the solution |  |
| 2) Correctly opened the meeting by explaining the purpose AND AGENDA of the meeting and getting approval to continue |  |
| 3) Correctly made the "link" with the previous meetings, showing the evolution of the negotiation |  |
| 4) He made it clear that he was there to get a good negotiation for both parties |  |
| 5) Reminded the client of the positive feedback given by the team throughout the process, as a way to create a positive and favorable environment for negotiation |  |
| 6) Correctly used the client's profile during the meeting |  |
| 7) Correctly used the motivators of the client's profile |  |
| 8) Established a good "brain tune" with the client |  |
| 9) Used appropriate arguments to encourage the client to make a decision |  |
| 10) Encouraged the client to talk about the objections so that they could be addressed |  |
| 11) Correctly made the "check-points" to confirm the understanding of what the customer was saying |  |
| The seller knew how to treat the theme "price", having his MAAN, and negotiating something in exchange for the discounts |  |
| The seller knew how to negotiate with the tactics of the "professional buyer" |  |
| The seller came out of the meeting certain of the next steps in the decision and approval process |  |

# Self-assessment form - Sale of VALUE

|  |  |
| --- | --- |
| **Seller Evaluation Form** | **Yes/No** |
| **Articulating VALUE for the customer** |  |
| The salesperson conducted the meeting well from beginning to end |  |
| 1) Warming up - creating credibility |  |
| 2) Reframe - taking the client out of the comfort zone |  |
| 3) Rational immersion - showing data and facts |  |
| 4) Emotional impact – to bring the customer "closer" |  |
| 5) Value proposition - showing the new way |  |
| 6) Solution Map and Implementation |  |
| The seller has established the 3 levels of credibility |  |
| 1) Credibility in the seller |  |
| 2) Credibility in the solution |  |
| 3) Credibility in the company |  |
| The seller made clear his strengths and differentials |  |
| The salesperson used "causos" to discover area of adhesion with the customer |  |
| The salesman taught with passion |  |
| The client was satisfied with the time investment he made |  |
| **Engaging decision makers and influencers** |  |
| The salesperson has shown the customer that he has a network of relationships |  |
| 1) Used the network to understand the situation |  |
| 2) Showed their solution to the network making them comfortable |  |
| 3) Knows the benefits of the solution for each element of the network |  |
| 4) Used testimonies or testimonies given by the elements of the network |  |
| **Shortening the sales cycle** |  |
| The salesperson "pressured" the customer to be able to evolve in the process |  |
| The salesperson left the meeting knowing whether or not the customer wants to buy |  |
| The seller knew how to correctly treat the theme "price" and "discount" |  |
| The seller knew how to show the value of the solution instead of just "price" |  |
| The seller knew how to address the typical concern of this phase of the negotiation |  |
| The seller prepared for the negotiation |  |
| 1) Understanding the objection but postponing the concessions |  |
| 2) Discovering the customer's basic needs |  |
| 3) Figuring out the list of criteria the customer will use to make the decision |  |
| 4) Granting according to plan (needs and criteria) |  |
| Count of "Yes" (S) |  |

# Sales forecast - calculation of the closing probability rate

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
|  |  |  |  | **Are you going to make the purchase?** | | **Stitches** |
|  |  |  |  | The customer recognizes the problem | | 1 |
|  |  |  |  | The problem has a high-value impact | | 2 |
|  |  |  |  | The problem brings risk to the customer | | 3 |
|  |  |  |  | The decision-makers are known and are convinced that they need to solve the problem | | 2 |
|  |  |  |  | There is an approved budget for the purchase | | 1 |
|  |  |  |  |  |  |  |
|  |  |  |  | **Low**  (<4 points) | **Medium**  (4 to 7 points) | **High**  (>7 points) |
| **Are you going to choose me?** | **Stitches** |  | **High**  (>7 points) |  |  |  |
| I was the first supplier to discover the opportunity | 3 |  |
| I am already a supplier to this customer and he is satisfied | 2 |  | **Medium**  (4 to 7 points) |  |  |  |
| I am a supplier approved by the client | 1 |  |
| The customer does not have a purchasing department or does not need more than one proposal | 2 |  | **Low**  (<4 points) |  |  |  |
| I have trading margin | 1 |  |