SellingPower
Sales Management Newsletter

Help for Your Pre-Call Prep

When you get right down to it, sales are won or lost on preparation. The more thoroughly you've prepared for a call, the more likely you are to progress to the next step. So why is it that so many sales professionals still rely on a quick, pre-call get-together at the local coffee shop to discuss strategy? Or use the car ride to the client's office to collaborate with colleagues on the impending call? That's not preparation – that's cramming. And it's no way to win a sale.

Yet, even if you do things right – sitting down in advance of the call with everyone on the selling team, walking through all aspects of the call, and role-playing the most critical parts – there's usually little more left of your planning session than notes on someone's computer or on a pad of paper. Which means that next time you're planning for a similar call, you have to start from scratch.

The folks at Richardson figured there had to be a better way. Their solution: the Richardson SalesCallPlanner, an online, real-time planning and training solution that walks sales professionals through important pre-call planning steps, provides written documentation of the sales team's collaboration and preparation, and gives sales managers a springboard from which to coach. Frank Donny, senior VP Product Management at Richardson, says the program aims to streamline prep time using a "tried-and-true methodology" while refining the quality of sales presentations. It integrates with all major CRM platforms.

The planner is event-driven, meaning it is tied to a specific client meeting through your CRM system. It can only be launched once that meeting is scheduled. From there, everyone going on the sales call gets together online or in person to populate the planner with information such as the call's objective, a visualization of the call (how you will open, questions to ask, idea/solution to position, etc.), client preparation (main issue from last contact, time frames, assumed needs, pricing issues, etc.) and technical preparation details. You can map out dialogue and, where skills need polishing, you can launch short coaching videos on essential sales skills topics such as opening a call, preparing questions, overcoming objections, and so on.

"The unique thing is that sellers have all the previous account plans and can import them into their new account plan to leverage best practices," says Donny. So not only are you not starting from scratch each time, you're starting with best practice pre-call plans.

With the pre-call planning work formally recorded, managers now have a solid platform from which to coach. "Managers can review how the rep has planned for the call," says Donny. "They can open up the call plan, look at it together, and the manager can coach the rep on changes to the call plan, make recommendations on what to say and what to ask. It becomes a pre-coaching tool for the meeting." After the meeting, the selling team can go back into the SalesCallPlanner and do a post-call report on each area, noting how things went compared to expectations. And again, managers can use this documentation as a springboard to a post-call coaching conversation.

At a time when relatively few initial discussions with a client are progressing further into the sales cycle (40 percent of organizations say only 25 – 50 percent of initial discussions progress to a presentation; 30 percent say 51– 75 percent of discussions do so, according to CSO Insights), the issue of pre-call preparation deserves some attention. After all, it's the quality of your preparation that largely determines whether or not the client agrees to a second meeting. "With the limited budgets and limited time that people have today, there's nothing more critical than ensuring salespeople maximize their time and maximize their prospect's time," concludes Donny.