

SETTING CLEAR AGENDAS

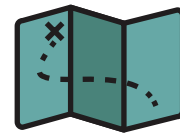
DESIRED TARGETED OUTCOMES

- **Professionalism.** *Pros plan, rookies wing it.* Demonstrates that you won't waste client's valuable time. Sales rep has a focused plan to help prospect or client solve critical problems and achieve important goals. Customer perceives sales rep as trusted business advisor, not an order-taker.
- **Clarity reduces anxiety.** Strong, purposeful agendas help prevent two dreaded customer conditions: boredom and agitation.
- **Establish control.** Why do doctors establish 100% control of a patient's visit? Because the doctor is the expert. Sales should be no different. If the sales rep is not an expert then why is she/he in sales?



AGENDAS: GUIDING PRINCIPLES

- **Your First Sales Call:** During a first call, two primary objectives are: 1) Building a relationship, and 2) Qualifying the prospect. Agendas always reflect the context of a business relationship.
- **Sales Call Continuum:** Agendas always build upon discoveries made in the previous sales call. *Detailed call notes are essential!*



CORE SKILL: THE PBC (PURPOSE-BENEFIT CHECK)

- **A Singular Clear Purpose** (e.g. objective, goal)

The objective of my call today is to understand how you are marketing to millennials.

Why should I care?

- **Benefit Statement**

There will be three benefits to you for having this conversation.

Learn the incredible purchasing power & habits of this demographic

Gain clarity of the key elements of an effective millennial marketing plan

Understand our capabilities for helping clients like you gain market share with this group and grow your top-line revenue by 20-30%



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continued

CORE SKILL: THE PBC (PURPOSE-BENEFIT CHECK)

continued

- Check for Agreement & Additional Contributions

How does that agenda sound for you?

Great.

Are there any other pressing topics you'd like to add to *our* agenda?

- "Our" and "We" language communicates a collaborative relationship and that the prospect/client is in full control. This approach helps build psychological safety for the client. (Remember: **PEOPLE HATE BEING SOLD TO**).

TWO SKILLS

- Establish and Manage Time

I've budgeted 20 minutes for our agenda. Does that still work for you?

- State Possible Next Step/Action/Commitment

At the end of our conversation, if you decide we have the capabilities to help you market to millennials, I recommend we set a 45-minute meeting where I show you how we help businesses like yours grow measurable top-line revenue. How does that sound?



PRO TIP

Many sales reps wait until the end of the call to make their ASK, if at all! This puts the rep at risk of having to manage objection(s) at the end of the call when time is up... bad position to be in! Clarifying possible next steps *during* the agenda creates clarity and says, "you decide," giving client full control. If there are objections, you have time to effectively manage them.