


## Purposeful Research & Starting Strong

Success is often determined before you walk in the door!



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## Preparation

- Time with customers is the most valuable time you spend as a salesperson – YOU MUST PREPARE
- Eckert's Rule..... (is 1 to 1 even enough???)
- Valuable for two key reasons.....

**Saves Time**  
The unproductive time with the customer and the overall time spent getting to a solid yes or no is cut. In the end the investment up front pays off

**More Effective**  
You often don't get a second chance, so what you do with the customer is critical, and a prepared salesperson has more effective customer interactions



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## Two Key Research Areas

- **PEOPLE**
  - Work
  - Education
  - Interests
  - Activities
  - Affiliations
  - Other (family?)
- **ACCOUNT**
  - Accounts (their clients)
  - Background (history)
  - Culture
  - Demographics
  - Environment (industry, competitors, internal)

Do not Pry!  
Keep business focus

The goal here is **INSIGHT**, not just knowledge



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## Research Insights



- QUESTION HINTS
  - Research suggests a questioning direction
- SOLUTION HINTS
  - Research suggests a specific solution is likely
- PERSUASION HINTS
  - Research suggests possible angle of persuasion
- CONNECTION HINTS
  - Research suggests way to make connection

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## Pre-Call Check-List



- Insights reviewed and documented
- Goals set
  - Visionary - Primary - Fall Back
- Agenda Set
  - Big Picture - Current Meeting
- Communication Tools Developed
  - Questions for a Needs ID Meeting
  - Presentation Materials for a Solutions Meeting

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## Entering the Meeting



- Greet
- Shake
- Ask to Sit
- Ask to Use Desk
- Business Cards
- Go into CLAP model.....

**During this think:**  
SLOW  
SMILE  
DEFER

**CULTURE ALERT** This process will need to be adapted to the culture you are doing business in.

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## Time to Sell!



- **CLAP Model** to help you start strong
- **Purposeful Questioning** to help you achieve understanding
- **Purposeful Presenting** to help you connect your value to that understanding
- **CRC Model** to help you remove obstacles
- A **Direct Ask** to help you secure commitment
- **EDGE model** to help you exit gracefully.

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