

ACTION PLAN FOR A SUCCESSFUL SALES CALL

This step by step action plan for a successful sales call is designed to help you to easily and efficiently make the contacts you need to grow your business. Following a simple, systemized plan for the approach and appointment will help you keep your efforts focused and on track. When you have the tools you need and know exactly what to do next, your confidence will soar. Making sales calls will cease to be a chore, and become exciting opportunities to ensure your business into the future!

Start by selecting several of the types of business partners you would like to develop new relationships with, such as financial planners, CPA's, attorneys, realtors, or business owners.

ACTION #1: DETERMINE WHAT TYPE OF BUSINESS PARTNERS YOU WANT TO TARGET

- _____
- _____
- _____
- _____
- _____
- _____

Now choose several of your top clients, current business partners, even family and friends to ask for their recommendations of those particular types of business partners. Knowing that people tend to refer others who are somewhat like themselves, choose these sources carefully.

ACTION #2: SELECT A LIST OF SOURCES FROM WHOM TO ASK FOR REFERENCES

- _____
- _____
- _____
- _____
- _____
- _____

ACTION #3: PRINT OUT THE GRID AND FORMS BELOW, AND MAKE "TARGET PACKETS"

The grid will keep your efforts focused. Complete the top row of the grid with the types of business partners you have determined that you would like to target. Complete the leftmost column with the sources that you have selected to approach for potential recommendations of those types of business partners.

Your target packets will include business partner information pages, "magic question" appointment sheets (both found below), and a blank note card. If files are created with these items in advance, the more quickly and efficiently you are able to approach your targets. When your tools are prepared and right at hand, your efforts are much less likely to fall off track.

ACTION #4: START MAKING CALLS TO YOUR SOURCES

Next you can complete as much of the grid as possible by contacting your selected list of sources. When contacting these individuals, let them know that you selected them because you respect and value their opinion so highly, and you would like the opportunity to work with others who are like them. Do they know someone who is a great financial planner, CPA, attorney, etc. that they could recommend to you? Be sure to ask WHY they would recommend them, and use the business partner information forms to track all of the data you are gathering about this potential new business partner.

In addition to beginning to develop a warm list of new targets to approach, this technique also yields several additional benefits to you. Even if your selected source is not immediately able to make any recommendations to you, they will be exceptionally flattered that you value their opinions so highly. Also, if they are able to make some recommendations but not round out the entire list, (i.e.: creating a “hole” in the grid) they have provided you with a potential opportunity to refer one of your valued business partners to them.

ACTION #5: PREPARE FOR THE APPROACH

Research your target. Use the form below or your own variation, and start a business partner file on your target with the information you have been provided by the person referring them. Also take a look at their website if they have one, and research online for any additional information you can find out about them. Your advance knowledge of who they are will immediately set you apart from the competition, and allow you to ask more effective questions when you have gained the appointment.

BUSINESS PARTNER TYPE: SOURCE PROVIDING REFERENCE:					

BUSINESS PARTNER INFORMATION

NAME:

COMPANY:

ADDRESS:

HM ADDRESS:

WEBSITE:

EMAIL:

OFFICE PHONE:

HOME PHONE:

MOBILE:

PAGER:

FAX:

OTHER:

ASSISTANT NAME & INFO:

SPOUSE:

CHILDREN:

DATE OF BIRTH:

OTHER INTERESTS/SPECIAL NOTES:

REFERRAL SOURCE:

WHY REFERRED?

ANY OTHER INFORMATION GATHERED FROM OTHER SOURCES:

NOTE CARD SENT – DATE: _____

FOLLOW UP MESSAGE LEFT – DATE: _____

PERSONAL TOUCH SENT – DATE: _____

WHAT I SENT: _____

PHONE CALL FOR APPT MADE – DATE: _____

APPOINTMENT MADE FOR DATE: _____

TIME: _____ **LOCATION:** _____

T'YOU NOTE SENT TO REFERRAL SOURCE – DATE: _____

CONGRATULATE MYSELF FOR SUCCESS!!

SALES CALL FOLLOW UP PLAN:

MY THOUGHTS ON THE APPOINTMENT:

**ANY CONCERNS I HAVE ABOUT PURSUING THIS
RELATIONSHIP?**

THEIR NEEDS/CONCERNS:

HOW I FEEL I CAN WORK WITH THEM BEST:

ACTION PLAN/WHAT I WILL DO NEXT:

ACTION #6: PUT YOUR APPROACH PLAN INTO ACTION

- **START BY SENDING A NOTE CARD TO YOUR TARGET:**

Idea: John – just wanted to drop a quick note to introduce myself. I've heard great things about you, and hope we might have the opportunity to meet sometime soon. Best wishes-

- **A FEW DAYS LATER, LEAVE A MESSAGE:**

Try something like this: “Hi, this is _____ from ABC Mortgage, and I hope you got the note and card I sent a few days ago. You know, I've heard a little bit about you, and based on what I have heard, I think it's possible that we would be a good fit for doing business together. I'd really like the opportunity to meet with you for a few minutes to see if you might feel the same way. I'll call you back to follow up in a few days – look forward to speaking with you!” This is much more effective when left as a message, rather than actually getting the person on the phone at this point. Don't be afraid to block your number or call from a line where your number/name will not show on caller ID, and claim “wrong number” if they answer!

- **FOLLOW UP SHORTLY WITH A “PERSONAL TOUCH”:**

IDEAS – small books are a great idea, as people are always flattered to receive a book as a gift, and they will not get thrown away. You can write a small personal note right in the book, such as “I enjoyed this book, thought you might as well – Best Wishes!” and be sure to include your business card. Some examples of appropriate books might be: The Richest Man in Babylon (George Clason), Think and Grow Rich (Napoleon Hill), Raving Fans (Ken Blanchard), the E-Myth Revisited (Michael Gerber), Swim With the Sharks Without Getting Eaten (Harvey Mackay). Go to local bookstore for more ideas – look in the business or motivational section, or check out Successories for other ideas. Use your imagination!

- **MAKE ANOTHER CALL AND ASK FOR THE APPOINTMENT**

ACTION #7: PREPARE FOR AND CONDUCT THE APPOINTMENT

- **Confirm in advance how long you will be there, and at the appointment, verify that they still have the time to meet with you for that time period. Let them know that because you respect their time, you want to confirm that they are still able to meet for the 30 (or ____) minutes that you had scheduled with them. This will put them at ease, knowing that you are not planning to stay for the day. Never overstay your predetermined time, they can always ask you to stay longer.**
- **Make sure that you do have something very brief prepared to share about yourself, such as a success story on how you helped a client recently or why you are in the mortgage business. Remember, by inviting a loan officer into their office, they know why you are there. DO NOT spend time selling yourself, instead – let them know that you are there because you know a little bit about them and want to learn more as you feel that you might be a great match to do business together. This also lends an “exclusive” feel to your services, making you more desirable to your target. Do not bother to share how great your “products, rates, or customer service” is. These are the price of playing the game, not a competitive advantage.**
- **Ask them if it is OK to take notes while you talk. The nice side effect of using the interview technique described below is that it also helps to take the normal sales call jitters away.**

ACTION #8: DEVELOP YOUR OWN LIST OF MAGIC QUESTIONS

Have your own “magic questions” prepared in advance, and make up an interview sheet like the one found below to have ready for your meeting. Make sure you ask the questions in a conversational manner, and ad lib as needed. Don’t read the questions as if they are a test.

Here are some ideas:

Who is your ideal client? Why?

Who is your competition?

What kinds of change or growth do you see in your business?

What do you like best about your relationship with your current lending partner?

What would you change if you could?

What are your top priorities in working with clients?

Can you tell me a little about your background?

What do you see as the long-range goal for your business?

Is there a type of client you prefer not to work with?

What are your “hot buttons”?

Select some of the above, or come up with some of your own:

- _____

- _____

- _____

Use the questions you have selected to prepare a sheet like the following that you can bring with you into your meeting. Remember that these are to be used as a guide - usually the discussion will go its own way. Don't feel like you have to follow a particular order or even get through all of your questions at all. One of the primary purposes of bringing this sheet is so that you can listen more effectively. You don't want to be so worried about what you will say next that you can't really hear what they are saying to you!

Remember that this is a discussion, not a sales pitch. Listen to their answers carefully, and learn as much as you can. Ask follow up questions on points they bring up that you find interesting. Remember that everyone's favorite topic is: THEMSELVES. Let them do the talking. Again, they know why you are there. You are most interesting to someone when you show them that you are interested in them!

You will have some brief information prepared as discussed above to share about yourself, but don't be afraid to tell your target that they have given you much to think about, and you would like to get back to them with an action plan for how you think you could work together most effectively.

Name:_____

Date visited:_____

1) Tell me about your ideal client:

2) What are your top priorities in working with your clients?

3) With your current referral partner for home loans, what is working really well about that relationship?

4) What would you change if you could about that relationship?

5) What kinds of change or growth do you see upcoming in your business?

ACTION #9: FOLLOW UP

Always follow up with a handwritten note, thanking them for their time. Review your notes in detail, and determine if this target is indeed a good match as a referral source. If so, follow up with a plan for how you feel that you can work best together. How you take this step will be very individual, depending on the nature of the target and the meeting, and a written “plan” may be very unnecessary. But for example, if your target was a realtor who would like to work with first time homebuyers – get a plan started for doing home financing seminars together. Keep a file or cheat sheet on EVERY business partner you work with that contains your notes from this meeting, as well as the additional significant information you will gain over time – spouses name, hobbies and interests, birthday, etc. Be sure to add the contact to your database, and include them in your ongoing marketing plans throughout the year.

ACTION #10: BELIEVE IN YOURSELF AND THE POWER OF HAVING A PROVEN PLAN FOR BUILDING RELATIONSHIPS. REPEAT THIS PLAN FROM ACTION STEP ONE AS OFTEN AS YOU CAN, AND REWARD YOURSELF FOR YOUR SUCCESS!