

Art of Sales Sales Analysis
Pre-Call Checklist

SALES ANALYSIS CHECKLIST

Why is this sale call important?

How will this particular sale depend upon your skill?

Is this sales call determined by sound economics?

How will it affect your long-term success?

Have you spent enough time studying for this call?

How well prepared are you to make this call?

Have you analyzed the key factors involved?

How well do you understand:

...your sales philosophy?

...your current attitude?

...your target customer?

...your leadership skill?

...your sales process.

How is this call affected by your sales philosophy?

How does your sales philosophy address your customers
goals?

How does the customer depend on you?

How have you tied your success to the customers?

How does your philosophy encourage honest relationships?

Customer _____
Contact: _____
Analysis Date: _____ Sales Person: _____
Goal: _____
Skill: _____
Value: _____
Big Picture: _____
Study Time: _____

Preparation: _____
Key Factors: _____
Overall Comfort Level: _____
 With Philosophy: _____
 With Attitude: _____
 With Customer: _____
 With Your Ability: _____
 With Sales Process: _____

Role of Philosophy: _____
Shared Goals: _____

Interdependence: _____

Trust Level: _____

CALL ANALYSIS

What is your attitude *today*?

Do you feel optimistic or pessimistic?

How does your attitude fit the customer's temperament?

Should you adjust your mood before making contact?

How well do you know the customer?

Are they easy to contact?

Are they easy to work with or difficult?

Are they open to new ideas or narrow-minded?

Are you working with the right decision-maker?

Can you control of the sale?

Are you smart, honest, caring, brave, and disciplined?

How effective is your sales process?

Does it fit the organization that you are selling?

Are you or your customer controlling the process?

How well can you predict the customer?

Which of these five factors is your weak link in this sale?

How can you strengthen your position?

Are you being objective in your analysis of your situation?

Are you ignoring any key information?



SALES ANALYSIS CHECKLIST

Current Attitude: _____

Level of optimism: _____

Customer temperament: _____

Needed Attitude: _____

Customer Knowledge: _____

Ease of Contact: _____

Working Relationship: _____

Openness: _____

Decision-Maker: _____

Sales Control: _____

Weak Points: _____

Process Quality: _____

Organizational Fit: _____

Determined by: _____

Predictability: _____

Weakest Factor: _____

To Stngthen: _____

Objectivity of Analysis: _____

Overlooking what: _____

CALL ANALYSIS

What is important in this particular call?
What questions do you need to ask?

Have you asked:
How does your product compare with the competition?
How does the customer view your sales approach?
How long will the decision process take?
Does your sales process fit the customer's needs?
Do you and the customer agree on what the key issues are?
What does the competition know that you don't?
Is making this sale going to be profitable?
What are the chances that you win or lose this sale?
Are you acting on the basis of good information?
Are you confident of success?
Should you keep your standard approach?
Are you worried about success?
Should you change your planned approach?
What if it doesn't work?



What do you need to hear from this customer?
What key points are you listening for?
What signals are you listening for?
What will you do when you hear them?
How can you use what you hear to control the decision?



SALES ANALYSIS CHECKLIST

Call Goal: _____

Needed Knowledge: _____

Competitive Position: _____

Approach: _____

Decision Timing: _____

Fit to Needs: _____

Agreement on Keys: _____

Competition's Knowledge: _____

Profitability: _____

Chance of Success: _____

Quality of Information: _____

Level of Confidence: _____

Fit to Standards: _____

Level of Anxiety: _____

Need to Change: _____

Fallback Position: _____

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Needed Feedback: _____

Needed Hot Buttons: _____

Desire Signals: _____

Planned Action: _____

Leverage: _____

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CALL ANALYSIS

What are your assumptions?
How do customer preconceptions affect this sale?

How can you show humility?
How can you demonstrate patience?
How can you appear curious?
How can you show confidence?

Do you need to tempt the customer?
Do you need to provide direction for the customer?
Do you need to learn from the customer?
Are there reasons you shouldn't be talking to this person?
How do you plan to excite the customer?
How do you plan to address their objections?
How can you make the sale easier for them?
How persistent do you plan to be with this customer?
How do you plan to close the customer?
How can you surprise them?

How much does this customer need you?
How much do you need them?



SALES ANALYSIS CHECKLIST

Your Assumptions: _____

Customer Perceptions: _____

Demonstrations of:

Humility: _____

Patience: _____

Curiosity: _____

Confidence: _____

Needed Actions:

Incentives: _____

Leadership: _____

Student: _____

Reservations: _____

Excitement: _____

Handling Objections: _____

Making It Easy: _____

Persistence: _____

Close: _____

Surprises: _____

Interdependence:

Customer Need Level: _____

Your Need Level: _____



CALL ANALYSIS

What are the chances that you actually will get an order
today as opposed to another time?

Can you give the customer lots of reasons to buy now?

If you ask for a decision now are you more likely to lose
the sale than win it?

Would some other time improve your chances?

Why might today be the best time to close the sale?

Why might it be better to wait until another day?

Have you done the analysis to know if you must close?

What customer signals are you looking for?

What do you predict will happen during the sales call?



SALES ANALYSIS CHECKLIST

Chance of order today: _____

Another time: _____

Reasons to Buy Now: _____

Effect of Close: : _____

Improve Chances: _____

Why Today: _____

Why Wait: _____

Must Close: _____

Needed Signals: _____

Predict What will Happen: _____
