Planning Your Call

by Mike Morton

The simple process of "Planning Your Call" will keep you and your team on track during customer encounters. It will be well worth the 5- to 10-minute investment of time, as it will result in more productive calls for you and your team.

We often fail to realize the true importance of spending little, but critical time, to actually plan our sales call. The CPS Call Plan is part of our methodology that enables you to get the most out of your sales calls.

What do we normally do when we decide to make a high-level customer call?

We worry about the time and the team who's going to be there and the moods of the customer team and what your team is going to say—or not say. What if we do a little planning for that important call you're making this week?

A common complaint today is, "*I don't have enough time*." Consider the executive you are calling on and how little time he has. I heard the term "negative time" recently. While we haven't figured out the time machine yet, call planning WILL generate time. Time for your customer—a defined agenda, and time for your team—no missed items on the agenda, no mis-representation or surprises, no promises that you are unable to keep.

A Five-Step Call Plan

Determine your primary objectives. What objectives, if met, would make this call an extraordinary use of your time and your team's time? Every objective has to have demonstrable value to the client. If you can articulate it this way, you can achieve your objective.

Secondary (back-up) Objectives. If you are on a roll, or if you get shot down, what else could the customer do for you today? Provide information, leads, competitive positioning, and many others. Plan for these *secondary objectives*; they *are as important as your primary objectives*.

Value Deliverables (Gifts). Do not just ask for commitments from your customer. Every time you make an important customer call, bring value deliverables (gifts). These are not gifts that necessarily have monetary value, but that are of high value to the person receiving them and reflect thoughtfulness on your part. Some examples are business information, problem-solving, perspectives, and ideas—even just listening. Where do gifts fit in? Early, late, or an after-thought; make every gift a surprise.

Good Questions. When do we think of the best questions to ask? Too often, it is when we are driving away, or when your team asks, "Did you ask her ...." Spend some time understanding what you and your team need to know from this customer. Develop four or five good questions that you will ask during the sales call. Remember, "The quality of our knowledge is based on the quality of our questions."

Openings. Who is going to open this call and how? Most people start here...and end here. It is important to find out by asking, "How much time do we have for this sales call?" Plan on introducing the agenda or objectives for the sales call. Determine the style of the executive you are calling on and let them run the call or take charge, but hit the bulls-eye for "their needs." Practice the Platinum Rule *"Do unto others as they would have you do unto them."*