



iPhone App User Series

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PRECALL PREPARATION

How many times have you been in the car in front of the prospect's office before you begin preparing for the sales call about to happen? I've been there – we both have. So, we've come up with a very simple PreCall Template to help you think thru a major call.

1. **INNER GAME CHECK – IN.** This is about taking stock of your mental outlook. Are you needy? Are you nervous? Is your “intent” in the right place? If those things are out of place, you will be out of sorts.
2. **AGENDA EMAILED?** Have you sent the agenda to your prospect/client? A simple email is fine. A lot of white space. Just lay out the flow of how you want the meeting to go. Tell the prospect to respond if they have anything to add.
3. **UPFRONT LANGUAGE.** “Extremely important.” If you're going to script anything, script this part. A couple of options: **a)** historical review, so everyone gets on the same page; **b)** introduction of people and their roles so that we know who people are at the table. Be careful about allowing your team to introduce themselves. You WILL lose control; **c)** share how the meeting will flow—and what the “end” looks like, so there is an overriding objective of getting to a decision yes or no.
4. **PRESENTATION OF CONTENT w MINI AGREEMENTS.** This is about the sections of the call...maybe a proposal, or a demonstration or a specific line of questioning. Each of



PRECALL PREPARATION (*continued)

these should be preceded by a “mini agreement” where you set the context for the soon-to-be-talked-about subject. “In this next section I want to talk about a...but before we begin, here is what I’d like to propose....”

5. **CLOSE.** This is not the closing move...this is the closing of the meeting. We always like to get a “clear future” as to next steps. We like specific next steps...and drop-dead dates/deadlines if needed.

About The Hosts

The Advanced Selling Podcast is a production of Caskey, a sales and leadership development company in Indianapolis.

Bill Caskey and Bryan Neale host each episode released weekly.

You can contact them with questions or comments at www.askbillandbryan.com or go to www.advancedsellingpodcast.com

They are each available for speeches, trainings, breakouts or other events. Call Kathy Macaluso at 317.575.0057 for more information on how they can work with your group.

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Bryan Neale Bill Caskey