

SALES MEETING PLAYBOOK

Goals of The Meeting

- Understand the prospect's current situation and desire to change / use our products
- Demonstrate the value of our products to prospects based on their unique context
- Agree on a plan / path forward

Research Prior to Meeting

67% of buyers did not feel like the pitch was tailored to their needs. Investing time into researching your prospects before a meeting is vital to your success.

- Job title/Role of each person attending the meeting. (What are their goals, which of our buyer personas do they match with, what will they find most valuable from our offering)
- Look at the company website. (What does the company do, who is their target audience, what is their business model, how do they make money, how can we help them make more)
- Check their history with our company. (Are they in our CRM, who have they spoken to before, what was the outcome, how have they interacted with our website and marketing)
- Look at their social presence. (What are they talking about on social accounts, do you have common interests/groups/communities)

Set the Agenda

The biggest pain point for 59% of buyers is when a sales meeting runs too long. Setting a structured agenda will ensure you cover the essential points in the time given.

Example Narrative:

"The way I typically run meetings like these is to:

- 1. Spend 10-15 minutes learning about your specific context. This will allow me to really understand your specific use cases, and how I can help you best.*
- 2. From there, I can show you how our product can provide you with the most value*
- 3. If you like what you see, we can discuss how to best proceed. Sound good?"*

Discovery Phase

The second biggest pain point for 45% of buyers was when the sales rep didn't have a good understanding of their company or industry.

Qualifying Matrix + Sample Questions: [Note: Not all questions are meant to be asked and are not meant to be asked in a specific order.]

- Tell me about your company
- How does your business model work?
- What made you want to check out our product now?
- What are the goals for your sales organization in the coming 6 to 12 months?
- What were you hoping I could help you with today?
- What are the top initiatives on your plate right now?
- What are the top priorities of (sales leader, marketing leader, CEO)?
- What are the biggest challenges your team faces?

Assess the Need

Assess prospect's current level of satisfaction with their process / situation so you can dig deeper on their pain points and create urgency for implementing a new process or system.

- So, how is everything going now?
- Are you happy with the results?
- What could be better?
- What is your plan to improve _____?
 - a. Are you confident that that plan is going to work?
 - b. Do you want my help?
- Why is now the time?
- Do you have any concerns?

Define their Buying Process

Define the process involved for the client to make a purchase so you can prepare relevant content and include the right people in the conversation.

If you feel like you have enough information to show a tailored and relevant demo, move forward to the Demo stage.

- What types of resources would aid you best in that process?
- Who will be involved in the decision? Who else should be on our next call?
- What questions do you think your manager will ask when you tell her that you want to do this? - How will you respond?
- When does your year end? Do you have room in your current year budget for this decision?
- When does this need to be fully integrated into your workforce?
- How will the company justify the purchase? How is the company thinking about the ROI?
- Have you looked at other vendors? What did you like and not like?

Demo

Pick the features you are going to demo, and create a picture of before and after for each of them. Compare the way they do things today with the way they're going to do it after adopting our product.

- Describe the way a prospect does process x today, and why that is hard / painful / not bringing results
- Show in a very simple way how they would do it with your product. Do not get into nitty gritty or over-speak.
- Ask for feedback from the prospect
 - a. Do you think this would work for you?
 - b. How would you use this if you had it today?
 - c. Do you think that will help you accomplish x?

Close

Summarize the value you have shown them based on your discovery throughout the meeting and ASK FOR THE CLOSE.

Example Narrative:

"So what I just showed you in the demo was how you can _____ with product x. What do you think?"

Great! Are you ready to get started now? I can walk you through completing the purchase".