

# Tero International Outcome-Driven Selling

## Sales Planning Guide



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## Preparing for the Sales Negotiation

The first two steps to a Win/Win Negotiation according to Harvard University are:

1. Separate the people from the problem.
2. Focus on interests rather than positions.

### Step One: Separate the people from the problem

The first critical step in planning your negotiation is in knowing your goals. In determining your goal, ask, “What am I trying to accomplish”, not “What am I going to say?”

What do you want from the customer? What action do you want the customer to take? What do you hope to accomplish? Are all questions to consider in identifying your negotiation purpose.

What is the purpose of the negotiation? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Who is the customer in the negotiation? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

How are you perceived by the customer? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

How can you increase your credibility with the customer? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

What is the past history with the customer? \_\_\_\_\_

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What do you have in common with the customer? \_\_\_\_\_

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What do you know about the background and interests of the customer? \_\_\_\_\_

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What sincere compliment can you pay to build rapport? \_\_\_\_\_

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How can you create a productive negotiation environment? \_\_\_\_\_

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### **Step Two: Focus on interests rather than positions**

In the first step you focused on the relationships and goals of the negotiation. This second step considers your underlying interests and the interests of the others you are negotiating with and what is most important to them. Knowing the interests of the others involved helps you to prepare and increases the probability of getting your objective achieved. On the next page are two charts to help you document interests.

Think about your underlying interests and write them down in the chart provided. Ask the question “why?” five times to get to your underlying interests. Consider both short- and long-term interests and tangible and intangible interests.

<b>Your Underlying Interests</b>	
<b>Tangible</b>	<b>Intangible</b>
<b>Short-Term</b>	
<b>Tangible</b>	<b>Intangible</b>
<b>Long-Term</b>	

What are the underlying interests of the other party? Consider both short- and long-term interests and tangible and intangible interests. What underlying values influence these interests?

<b>Their Underlying Interests</b>	
<b>Tangible</b>	<b>Intangible</b>
<b>Short-Term</b>	
<b>Tangible</b>	<b>Intangible</b>
<b>Long-Term</b>	

What common ground have you identified? What do you both share an interest in? \_\_\_\_\_

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What open-ended questions can you ask to learn more? \_\_\_\_\_

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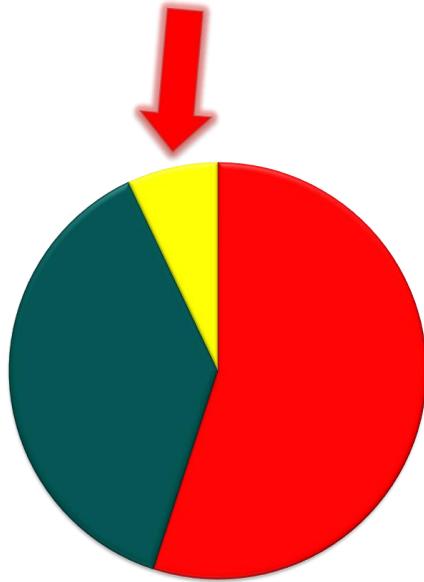
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## Step Three to Successful Negotiations: Generate Creative Options

You have something of value to communicate to your customer. How you present yourself determines the degree of credibility you achieve with your customer. What you say goes a long way to persuading or turning off your customer.



### **The 7 % Solution**

1. Your Objectives
2. Customer Analysis
3. Organizing Your Message

Your presentation must address the emotional position of your customer as well as present the facts.

How you organize your message is based on the learning styles of the individuals you are interacting with and your objective. What you say depends on the knowledge and attitudes of your customer.

## Your Objectives

The first critical step in planning is establishing objectives. In determining your objective, ask “Why am I making this sales call”, not “What am I going to say?”

To help identify your objective, reflect on your own underlying interests. Go beyond simply looking at the short-term, tangible goals of making a sale (price and quantity) and consider both the longer term and the intangible interests you have. What reaction do you want from your customer? What are you trying to accomplish in this sales call? What action do you want your customer to take as a result of your presentation?

Review the interest lists you generated for your customer in Step Two. Consider the following elements.

### Relative Importance of Factors

Weighing each factor allows you to decide how important each underlying interest is in relation to the bigger picture.

### Consideration to Other Parties

Rarely does a sales interaction happen in a vacuum. Individuals not directly involved in the sale may be called upon to support the decisions made or may be impacted by the outcome. This includes your manager, colleagues and other customers you serve. Members of these groups have interests, needs, and values that must be considered.

### The Relationships

It is important to remember that the areas of focus for each party extend beyond the topic or substance of the sales interaction and also include personal and relational needs. People want to feel valued and respected. They want to trust others and be trusted. They want to preserve their image and avoid looking foolish in front of others. All of these components are at play in your sales call.

Summarize your main objective and write it down in the space provided. This becomes the thread that will tie all aspects of your sales call together. If you can't say it in one sentence, you have too many objectives.

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## Customer Analysis

When you determined your objective for the presentation, you focused on what options you wanted to explore in the sales call. This step considers your customer and what is most important to him or her. Knowing your customer helps you to select the type and amount of information to present and increases the probability of getting your point across.

These 20 questions are designed as a guide for knowing your customer. It will help you determine what to include in your message and to identify the information that will be the most persuasive.

1. How many people will attend your meeting? \_\_\_\_\_

\_\_\_\_\_

2. Who are they? \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

3. What is their relationship to you? \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

4. What is their relationship to your organization? \_\_\_\_\_

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\_\_\_\_\_

5. What is their relationship with your competitors? \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

6. How familiar are they with your products and company? \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

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7. What are their attitudes, beliefs and values on your products and company? \_\_\_\_\_

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8. Why do they need to hear what you will say? \_\_\_\_\_

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9. What is your credibility with this customer? \_\_\_\_\_

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10. What is it about you that could help them relate to you better? \_\_\_\_\_

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11. What sincere compliment can you offer? \_\_\_\_\_

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12. Who are the key decision-makers? \_\_\_\_\_

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13. What is the most important benefit to them? \_\_\_\_\_

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14. Who is likely to support your point of view? \_\_\_\_\_

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15. How can you appeal to them? \_\_\_\_\_

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16. Who is likely to have a negative point of view? \_\_\_\_\_

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17. What is their concern? \_\_\_\_\_

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18. What facts do you have to address their concerns? \_\_\_\_\_

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19. What challenging questions do you expect to be asked? \_\_\_\_\_

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20. What other things do you know about the customer that are helpful to consider? \_\_\_\_\_

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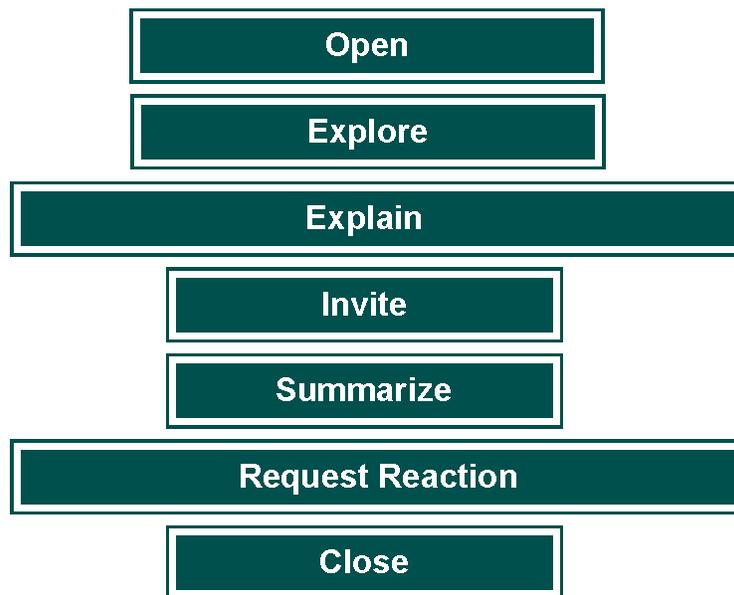
Underlying interests are not merely related to things like quantity and price. They are complex. People want to feel valued and want their values honored. They view the current interaction while reflecting on previous experience. Some of these underlying reasons may seem irrational (and they may be) but they are always valid since they are the closely held beliefs, values, expectations and experiences of others. To achieve our goals, we must uncover the underlying interests. By their nature, underlying interests are hidden and take some skill to reveal.



## Organizing Your Message

You have established your objective and carried out a customer analysis. By using effective organization skills you will help ensure you meet your objective and your customer understands the value of your message and the actions they need to take.

The seven stages of organizing your message are designed around what we know about how people learn and how people are persuaded. It allows you to make a brief presentation and then facilitate a dialogue, where you tie the features of your product to your customer's greatest needs so they see the benefits.



We'll look at each stage separately and then use these steps to develop your message.

### 1. Open

In this stage, you set the tone for the interaction by developing rapport, establishing credibility and sharing your objective. Rapport is developed by making a connection with your customer. This can be done through sincere compliments and sharing something about yourself that the customer can relate to.

### 2. Explore

In this stage, you explore the situation by discussing some key background information and relating it to your customer's needs and interests. You will also explore any problems, or potential problems related to your subject.

### **3. Explain**

Present evidence in the way of product features to support your proposal and connect it to the specific benefits of your products to the customer. What problem will your product or service solve for the customer? How is your product or service different from competitive proposals they are considering? Avoid overloading the customer with too much information. They can absorb only so much and you want to make sure it's your most important point that they remember. Stick to a maximum of three points.

### **4. Invite**

In this stage, explain to your customer what action they should take. Be specific and brief and continue to link the action to your main objective and their needs.

### **5. Summarize**

This stage is not your close. This is a transition stage to lead you into a useful dialogue with your customer where you can respond to questions, concerns and objections. Briefly summarize your objective, the situation, your proposal and the actions you are requesting.

### **6. Request Reaction**

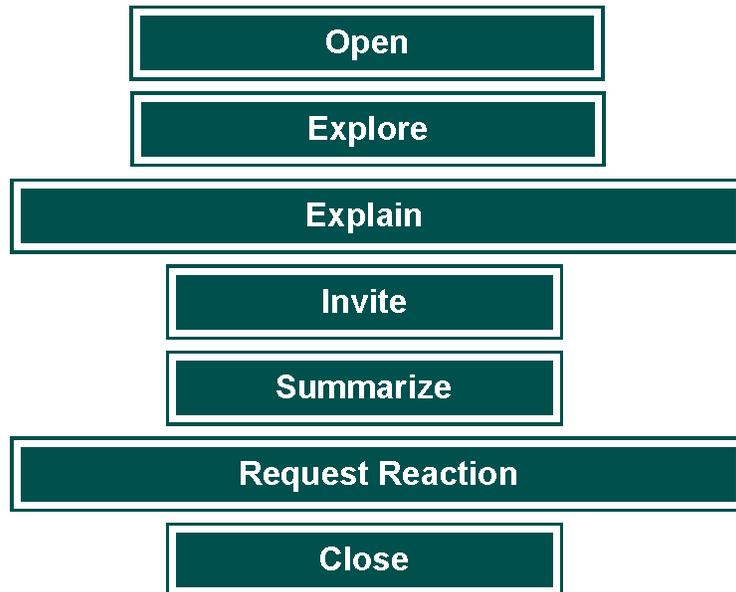
Now that you've shared your proposal with them, it's time to get their reaction. Do this by encouraging and responding to questions, comments and objections.

### **7. Close**

This is the final stage of the sales call. It is the point at which you wrap up customer questions and reinforce your main objective. Your customer will remember your close longer than any other part of your interaction. It must be strong, brief and upbeat and must lead to a next step and follow-up.

## Developing Your Message

Use the first five Stages of Organizing Your Message as you develop a presentation to present to the group.



Post-it-notes, rather than scraps of paper, give you increased flexibility in developing your message. Capture your thoughts on the post-it-notes and see where they fit in with the various stages. It is not necessary to follow the steps in order at this point. Resist the temptation to write too many notes. This is an outline, not a script.

Your sales presentation will be a maximum of four minutes in length. If it is longer, you are at risk of losing your customer's focus and attention.

Following are some questions to help you think through what information to include in each stage.

### 1. **Open** (allow 30 seconds for this stage)

- What sincere compliment can you pay to your customer or his/her organization?
- What can you share about yourself that your customer can relate to?
- What other things can you say to develop rapport?
- What can you say to establish your credibility with this customer?
- What will you say to establish the objective for your customer?

**2. Explore** (allow 30 seconds for this stage)

- What can you say to ensure the customer understands your message is valuable?
- What can you say to help them recognize the importance of your message if they are currently unaware of it?
- What problems is your product going to address?
- What potential problems will occur if your customer doesn't take the action you propose?
- What concerns does your customer have?

**3. Explain** (allow 2-2 ½ minutes for this stage)

- What is your idea or recommendation?
- What features do you want to highlight for this customer?
- What unique benefits will your customer find to be of interest?
- What evidence do you have to prove your point?
- What information would you like to include if you had more time (consider for handouts)?
- What are your areas of common ground with this customer?

**4. Invite** (allow 15 seconds for this stage)

- What do you want them to do?
- What is the timeframe?

**5. Summarize** (allow 15 seconds for this stage)

- How can you restate your objective?
- What can you say to tie your product features to a unique benefit for them?



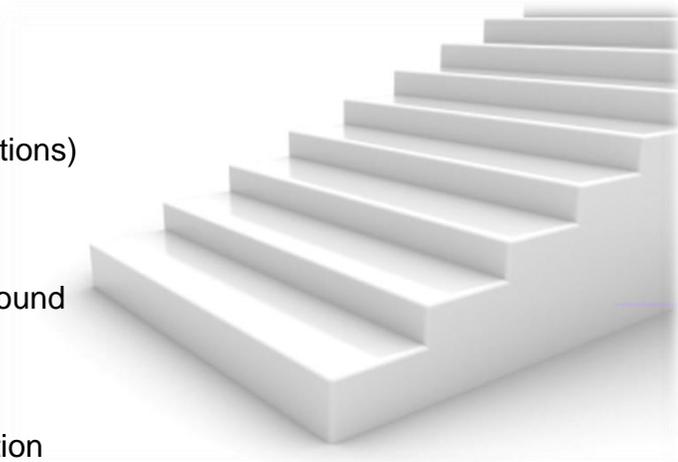
## Handling Questions and Objections

### 6. Request Reaction (allow as much time as permitted for this stage)

- What can you say to encourage customer response?
- What challenging questions can you anticipate?
- What open-ended questions can you pose if there aren't any?

Use the steps to effective listening to practice responding to challenging customer questions and objections.

1. Listen
2. Paraphrase (content/emotions)
3. Check in
4. Acknowledge common ground
5. Make your point
6. Ask an open-ended question



Effective asking does not come naturally to any of us. Even sales professionals who are skilled at asking questions are frequently doing so to check their own thinking rather than exploring the customer's perspective.

Closed questions invite a simple answer (often a yes or no response). They are useful in confirming your understanding or checking information. If overused, the other person can quickly deduce that you are more interested in what you are thinking rather than what he or she is thinking.

Open questions, on the other hand, makes a person feel that you are interested in their thoughts and they tend to participate and cooperate more.

Examples of good open-ended questions include:

- Please provide more specific detail.
- Walk me through an example.
- What were your reasons for?
- What were the circumstances surrounding?
- Help me understand what you mean.
- Walk me through your idea.
- Tell me more.
- What bothers you about this?
- Why is this important to you?
- Please tell me how this affects you.
- What other points of concern do you have?
- What would help to take the pressure off?
- What if we did it this way?
- What would you suggest we do to resolve this?
- Which way would you prefer?
- How do you feel about this?
- How could we do this?
- What do you think?

## Sales Close

### 7. Close

- What can you say to tie your message together and reinforce your key features and customer benefits?
- What can you say to close with power?
- How can you reflect back on areas of common ground?
- What can you say to create a sense of urgency with this customer?
- What are the next steps?
- If you aren't able to close the sale during this call, what can you say to gain permission to follow-up?

For the reluctant or hesitant customer, write down a few sentences using the sales professional's magic word "if" to help make the decision conditional and remove pressure and risk for the customer.

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### Support the Customer

What phrases can you use to comment on a customer's decision or compliment the person?

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### Follow-up

In the space below, write down several ideas for follow-up actions you can take with this customer.

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