

If This, Then What? 10 Insightful Sales Filters for First Appointments

Great first appointments are essential to starting off the sales process on the right foot. They are also the foundation of building a solid pipeline.

Here are 10 if-then statements to help you establish a solid first appointment policy:

1. If you are closing sales every month and want to avoid a slow month, then remember: scheduling a first appointment is the only way to replace a sale *and* a lost opportunity.
2. If you want to increase your deal flow per month, then remember: first appointments shorten the time between sales.
3. If you don't want a gap between closing one sale and closing the next, then begin replacing opportunities 4 to 8 weeks before you lose them.
4. If you need to decide how safe or strong to play a meeting, then look to your calendar for courage. First appointments are like trains in the distance delivering promise; collectively, they give salespeople their position of strength.
5. If your calendar has a lot of first appointments, then believe in the system and take the time to qualify each appointment so you only continue having appointments with the opportunities which are most likely to close.
6. If you need to get more prospects in your pipeline, then focus

on the little wins. This can include scheduling meetings to maximize fact-finding and relationship building because you need to learn about your prospect, their business, their team, and their goals.

7. If you want to increase your average deal size, then complete the “Biggest Possible Deal” exercise before every first appointment in order to properly evaluate the potential opportunity and identify the right starting point to collect the largest portion of budget.
8. If you conclude a first appointment with a promise to send a proposal, then you are attempting to actively shorten the sales cycle. But, be careful...
9. If you shorten the sales cycle too much by abbreviating the time between first conversation and proposal, then your proposal may reach them too soon -- before they are ready to make a decision.
10. If you want to uncover what the prospect is really thinking, then don't assume they only know what you tell them. What have they learned on their own? What is their history with similar products and services? Be sure to ask the right questions.

Familiarize yourself with these typical if-then cases for first appointments. With these in your arsenal, you'll be prepared with crucial insights.

4 Steps to Make Your Next Sales Call Amazing

Sales calls are a hugely important part of the sales process. You've probably had some great ones, but you've also probably had those that you've shoved back into the recesses of your mind and pray will never see the light of day again. So what can you do to make sure your next sales call will be amazing?

Here are four steps to ensure your next call goes smoothly:

1. Prepare

Being unprepared for anything is a recipe for failure. Taking the time to properly research and formulate a plan before your call is crucial. Reviewing information you have on your contact, including notes from previous meetings, email exchanges, etc., should be taken into account on how to approach the call. Also ensuring you're ready with the right address or the correct dial-in number, know the exact start time (especially if there is a difference in time-zones), and having all the necessary materials at hand is essentially common sense, but shouldn't be forgotten.

Don't take your preparation to the extreme and script out every potential conversation, but definitely have answers prepared for some common questions and objections you might encounter. Having a vision for the "next step" is also a fundamental part of your preparation.

2. Relax

Coming in straight away with a serious tone and jumping into your pitch isn't the best way to approach your meeting. Treating your contact like an actual human being and not simply as a sales prospect is the key to success. Making some small talk and taking

a genuine interest in them is important. No one likes to be treated as if they're being used for something, so make sure that any sort of scripted, salesy, and impersonal element is taken out of the equation.

Relax and talk to them, not at them. They'll read your approach and most likely mirror your ease. The meeting will go much smoother and you'll save yourself the stress of feeling like you need to tap dance the entire time. Make sure you're aware of their signals though and don't waste their time with superfluous chit-chat, but aim keep the meeting moving forward.

3. Listen

The sales call wasn't set up so that you could ramble on about your company and offering. Its purpose was to determine your prospect's needs and then demonstrate how your product or solution could fill the gap. That's why your meeting should consist of you asking questions. Make sure you're not assuming anything and ask them to specify, explain, and elaborate on any of their problems that you're going to try to solve.

Taking the time to listen to the answers and continuously be thinking of alternate approaches, suggestions, and recommendations is what you should focus the majority of your time on. Everyone appreciates when they can voice their thoughts and then have a solution be tailored to their specific case.

4. Remember

Taking notes is important, as is following up. You should have detailed notes on each item that was discussed in the meeting. In the heat of the moment it's easy to assume you'll remember everything that was said, but make sure you are jotting some things down during your call. By reiterating some items you've taken notes

on to your contact, the fact you're really listening to them will undoubtedly come across.

Remembering to follow up quickly with a summary and details about a next step is important. This will definitely convey that they are a top priority for you and it'll help them keep you top of mind. Even if the discussion didn't go exactly to plan and there won't be a next step, make sure you reach out to thank them for taking time to meet with you.

It's important to maintain a positive relationship regardless of whether you'll get the sale shortly, in a year, or maybe never. The world is a much smaller place in sales and preserving positive connections will surely help your credibility and reputation for the future.

Keeping these simple steps in mind for your next sales call will help establish a solid foundation for success.

What is your #1 tip for a great sales call?