



15 MINUTES TO READY

Eight crucial steps to make sure you
WIN at the next sales meeting

By "Doctor" Phil Bernstein
www.philbernstein.com
©2015 All rights reserved

"DOCTOR" PHIL BERNSTEIN
America's finest advertising, marketing and sales consultant

Now What?

You've done it. You've beaten your call reluctance, gotten past the gatekeeper, and have an appointment with a good prospect.

Now what?

Depending on the business you're in, that first meeting might be an opportunity for a one-call close... or it could be an opening conversation in which the prospect sizes you up and decides whether you'll have a chance to present your solution.

Get the first meeting right, and the money starts heading toward your bank account. Get it wrong, and you may never have another chance.

You need to prepare. On the following pages, I'll lay out an eight-step system for making sure you're prepared for the call. The whole thing will take you fifteen minutes or less.



When you're done, you'll know something about your customer. Knowing something about your customer puts you ahead of 90% of the salespeople on the streets today.

The best advice I can give you is this: **follow all the steps.**

WHY BOTHER? HERE ARE THE BENEFITS

You'll save yourself time -- **time** driving across town to see people who aren't there when you arrive. **Time** in front of unqualified customers. **Time** asking questions you could have answered in advance. **Time** working on proposals that aren't appropriate for the prospect you're meeting.

You'll save your prospect time: The days of starting a meeting with "Tell me about your business!" are over. Customers do not have time to tell you things you should already know.

You'll impress your customer. Too many salespeople -- including many who've been at this long enough to know better -- walk into a meeting uninformed and unprepared. Take a few minutes to learn something in advance, and you graduate from peddler to professional.

This system has three parts:

- Fixing the Meeting On the Prospect's Calendar
- Pre-Meeting Research
- One Last Day-of-Meeting Step



Fixing the Meeting on the Prospect's Calendar

Getting stood up sucks. There's nothing worse than driving across town and discovering that your customer isn't there. There are many variations on why a meeting doesn't come off as scheduled, but ultimately it comes down to one of three things:

1. **A fluke.** Your customer had a sudden, unforeseen emergency. This is rare, but it happens.

2. **Miscommunication.** You have Tuesday on your calendar, while the client has the meeting down for Wednesday. You think the meeting's at 2:00, while she thinks it's at noon. You think it's at his office, while he thinks it's at yours. (In my hometown of Portland, we have a variation: each of us goes to a different Starbucks).

3. **A flake.** The customer forgot about the meeting -- didn't record it on the calendar, or didn't look at the calendar after putting it down.



You can't do much about #1. Clients get sick... or their kids do. Water mains burst. The corporate office calls a sudden all-company meeting. I once arrived at an office and learned that the guy I'd been planning to see had been fired a couple of hours before. Stuff happens, and we've gotta live with it.

But there are steps you can take to minimize the chances of #2 or #3 taking place.

Here's what to do:



With your computer or smartphone: Make sure you get the client's email address when you're setting up the meeting. If you've got a common scheduling program such as Microsoft Outlook, immediately send a Meeting Request and request approval. This frequently catches a miscommunication early.

With an old-school pen, write an old-school note on an old-school note card: "I'm looking forward to meeting you on Tuesday, May 3 at 2pm at your Main Street store." Put it in an actual envelope, along with one of your business cards. Hand-address it, use a real stamp, and mail it to the client.

The beauty of a hand-written note is that while your prospects may get dozens of emails every day, they get very little personal mail. Your card may be the only personal mail they get all week, and it'll get noticed. It will arrive a couple of days after they agreed to the meeting, and will remind them to put it on the calendar if they hadn't already. Your business card will give them a way to contact you if there's a problem.

Pre-Meeting Research A Story of Preparation

Not long ago, a TV station Account Executive brought me out to meet with one of her most difficult clients -- an auto collision shop owner. I introduced myself, explained why I'd come, and told him I had some questions for him.

He stopped me right there, saying, "Before you ask *me* any questions, I've got one for you. What do you know about my shop?"

He'd been in business thirty years, and had likely lost count of the number of salespeople who'd walked in completely unprepared. This was a test; if I flunked, the meeting was going to be over quickly. I was ready.

I quickly rattled off five things I knew about the business: how long it had been open, how many locations they had, their slogan, the name of a competitor they'd recently purchased, and some equipment they owned that nobody else in town had.

"You've done your homework," he said. I smiled modestly -- or tried to. Modesty is not my default setting.

The research I'd done was all online, and had taken me about ten minutes to do. Those ten minutes made the difference between a good conversation resulting in a sale and the abrupt termination of the meeting.

Thirty years ago, this information was hard to come by, and it was acceptable for a salesperson to walk in cold.

What's changed?

1. Your customers don't have time to educate you about things you can find out on your own.

2. These days you can find out an enormous amount about your customers and prospects using nothing but a laptop and an internet connection.

One thing *hasn't* changed: many salespeople still walk in cold. Don't be one of them.

Before every first meeting, follow these steps. ***And take notes!***

Look at the client's website. Take a few minutes to poke around. Make a note of how many locations they have. Look at their "About Us" page. If there's a personnel list, look it over. If there's a bio of the person you'll be meeting with, read it and take a few notes. It may also give you some clues on their decision-making structure, and the names of people above and below them on the food chain. If there's a "News" tab, click on it and see if there are any recent updates or press releases.



Pre-Meeting Research: What The Internet Can Tell You

Are there links on the site to Facebook, Twitter, or YouTube? Click on each of them. You'll learn a great deal about how the company presents itself to the public.

Google the company name. Are they showing up on review sites like Yelp? You may quickly get an idea of their online reputation. Click on the tab that says "News" to see what's been in the press lately. I've learned about mergers, closings, even the arrest of a company CEO.

Google the name of the person you'll be meeting with. You might learn about an award they've won, or their kid's recent soccer championship. Researching a car dealer, I once stumbled onto an article about the time his business partner hired someone to kill him -- yes, an honest-to-goodness murder for hire! The hit was unsuccessful. I didn't mention it during our meeting, but it was interesting to know.



Finally, look your contact up on LinkedIn to learn about their history.

How long have they been in their present job? Where did they work before that? Where did they go to college? For now, use this strictly for research -- don't send a connection request until after the first meeting.

THE FINAL STEP: CONFIRM

On the day of the meeting (or the afternoon before if it's scheduled for early in the morning), call the client to confirm the appointment.

Don't depend on email for this; many people let their email stack up without opening it, or just skim it if they do open it. **Use the phone.**

Make it a quick call:

"Hi, Jim, I'm just calling to confirm our meeting at 2:00 today at your Main Street store!"

Why do this? Because this meeting is less important to your prospect than it is to you. They may have forgotten all about it -- you'd be amazed at how many people don't look at their calendars. Your phone call may be the only reason they're in their office when you arrive instead of out running errands.

I can already hear your objection: "Maybe they don't really want to meet with me. If I call, they might cancel!"

You're right. They might.

You did take notes, didn't you?

Good.

Now you've got one last task before you get in the car.



THINK ABOUT IT:

Maybe an unexpected emergency has come up, and they need to reschedule. Maybe they inadvertently double-booked the time. Maybe they forgot.

Better to learn about that before you get in the car and drive 20 minutes across town, not after you've arrived to find nobody there.

And if they don't really want to meet with you? Let 'em cancel. Your time is too valuable to waste it in meetings with people who aren't interested.

Eight Steps, Fifteen Minutes

- Two steps to fix the meeting on your client's calendar.
- Five steps of pre-meeting research
- One final step before you get in the car.

Thanks for Reading!

Like what you see? There's plenty more where this came from. Keep reading my blog at www.PhilBernstein.com. Got questions or want to argue? Feel free to email me at phil@philbernstein.com.

