

SALES



# Sales Management

## Unit Three: The Pre-Approach



# Course Layout and Overview

- ▶ Ten units
  - ▶ Unit One: The Importance of the Sales Function
  - ▶ Unit Two: Prospecting and Qualifying
  - ▶ **Unit Three: The Pre-Approach**
  - ▶ Unit Four: The Approach
  - ▶ Unit Five: The Presentation and Demonstration
  - ▶ Unit Six: Handling Objections
  - ▶ Unit Seven: Closing the Sale
  - ▶ Unit Eight: Follow-up
  - ▶ Unit Nine: Selling Strategies
  - ▶ Unit Ten: Selling Yourself



# Unit Three Learning Outcomes

- ▶ Apply different methods salespeople use to research prospective customers
- ▶ Compare strategies to research the company and the industry
- ▶ Use research to identify a prospect's potential needs



# Why are Learning Outcomes Important?

- ▶ Every learning outcome ties back to course materials and content.
- ▶ Assessments are tied to each learning outcome.
- ▶ Test preparation



# Unit Three Overview Topics

- ▶ Research prospective customers
- ▶ Company and industry research
- ▶ Identify a prospect's potential needs



# The Pre-Approach Vocabulary

- Company reputation
- Determining needs
- Prospective customers
- SMART objectives



# Research Prospective Customers

- Finding perspective customers
  - using demographics and psychographics
  - following up on customer referrals
  - asking customers for referrals
  - completing additional research
- Preparing a detailed customer presentation



# Selling Exchange Process

## THE EXCHANGE PROCESS

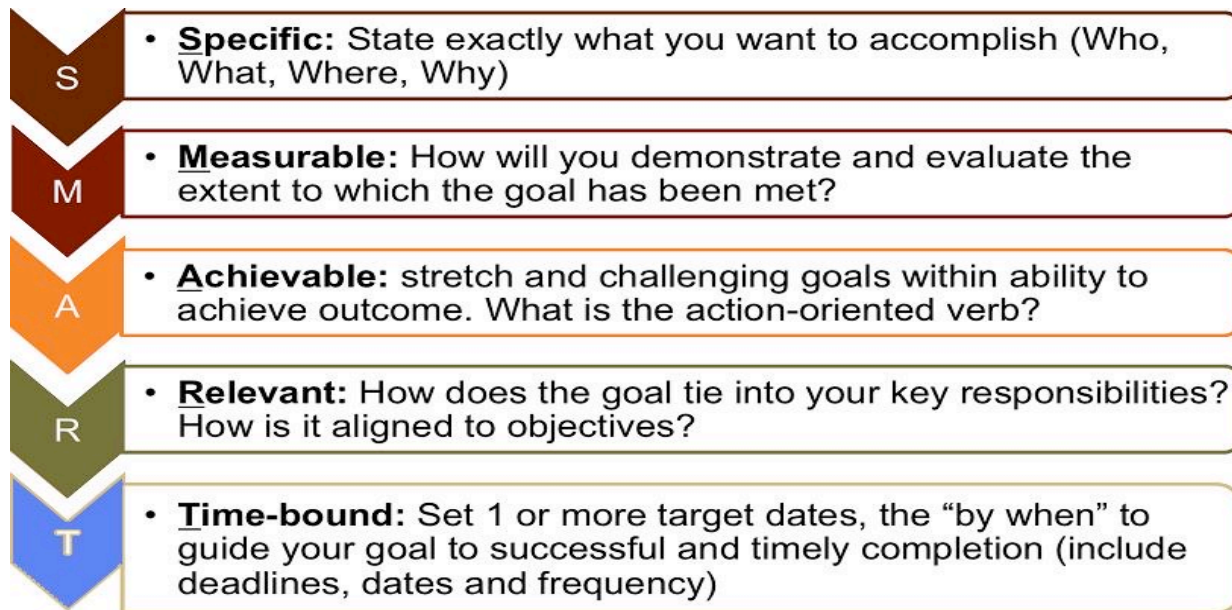


# Company and Industry Research

- Conducting company and industry research
  - online research
  - speaking to clients, customers, or employees
  - scheduling a meeting
- SMART
  - Specific
  - Measurable
  - Actionable
  - Realistic
  - time bound



# SMART Goals and Objectives



# Identify a Prospect's Potential Needs

- Company reputation
- Determining needs



# Conclusion

- ▶ Unit Three Learning Outcomes
  - ▶ Apply different methods salespeople use to research prospective customers
  - ▶ Compare strategies to research the company and the industry
  - ▶ Use research to identify a prospect's potential needs



# What's Next?

## Unit Four: The Approach

