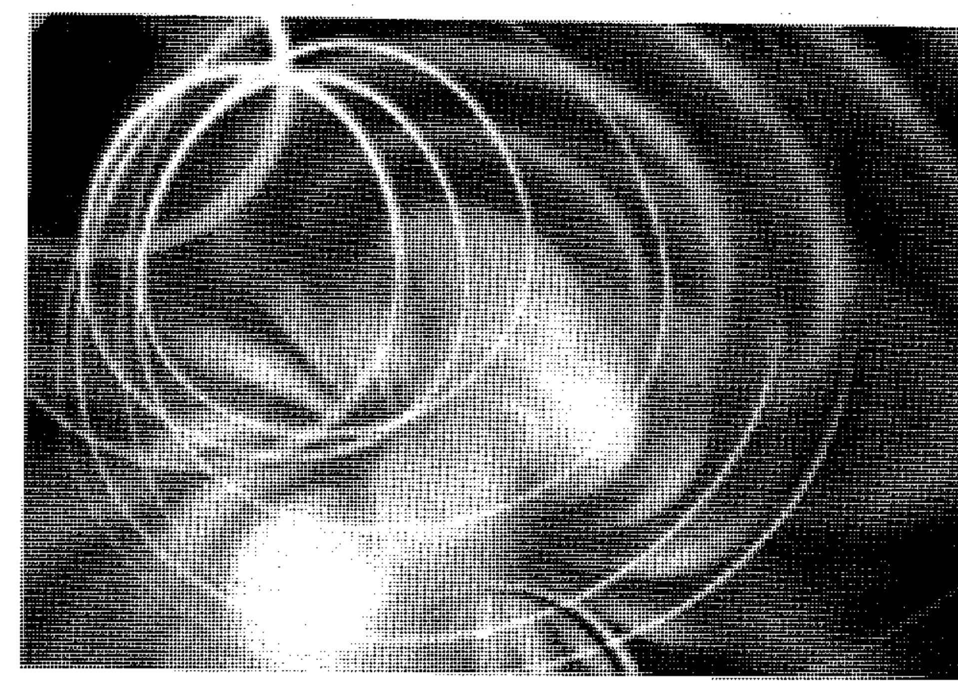
Chapter 8

The Approach



Key Terms

screener
small talk
telephone track

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Learning Objectives

Learning Objectives

After studying Chapter 8, you will understand:

- The best ways for gaining entry to the prospect's office
- Effective techniques for telephoning the prospect and selling the interview
- Proper sales etiquette
- How to make a good first impression with the client
- Ways for getting the prospect's attention at the beginning of the interview

The *approach* is the first time the salesperson and the prospect come into actual contact with one another. For this reason, many experts call it the most important 30 seconds in the selling process. At this time, salespeople must establish rapport and attract the prospect's attention. If they fail to do so, the rest of the presentation may well be for nothing. But it is not always that easy. Prospects may be thinking about getting a promotion, cutting departmental costs, or even playing golf later that afternoon. Yet the sales representative must somehow penetrate their train of thought and get them to focus on the salesperson's proposition. To solve this problem, numerous tactics have been developed, some of them showy and gimmicky and some even downright crude. In interactive selling, the basic way of gaining attention is by getting the prospect to participate in the opening. As we have said, nothing gains attention better than participation.

But before we get into some of these techniques for securing prospect attention, it is important to talk about arranging the face-to-face meeting between prospect and salesperson. There is no point in a sales representative's being the best "opener" around if he or she cannot get an appointment. The approach then consists of three steps: gaining entry, establishing rapport, and winning the prospect's attention once the face-to-face interview has begun.

8-1 Gaining Entry

Getting an appointment is easiest with an existing customer. At the other extreme is a first call. There are three basic ways for getting this initial interview: letter, telephone, and cold-call. Each has its advantages, disadvantages, and methods of application that improve effectiveness. Discussions of each method follow.

8-1a The Letter (or Email)

Compared with the telephone and cold-call, the letter (or email) is the least valuable means of gaining entry. It is the easiest to ignore or turn down. Because the salesperson is not present (or even on the telephone), the letter can quickly be thrown away. There is no guarantee that the letter even got to the right individual; a secretary may have pitched it as junk mail. To this end, the sales representative should address the letter to a specific individual, suggest some possible appointment dates and times, and then follow up with a phone call.

8-1b The Cold-Call

The primary decision that salespeople face with the cold-call is whether they are willing to trade the impact of a personal visit for the extra time expended. Although the advantages and disadvantages of the cold-call were discussed in Chapter 7, "Successful Prospecting," one important matter not discussed is the necessity of getting past a number of subordinates—"buffers," so to speak—in order to see the decision maker. Inevitably, with a cold-call, the salesperson first has to see a subordinate, usually a secretary or receptionist. In some instances, junior executives may be an additional obstacle. However, surprise long-run benefits sometimes arise from talking with these subordinates.

First, stride purposefully and confidently to the receptionist's desk. Smile and make eye contact. All of these activities communicate confidence, honesty, and sincerity—a professional image, in other words. Have your business card ready, without losing eye contact and without fumbling for the card. Pause to provide the receptionist time to start listening. Present your card, introduce yourself, and speak slowly and clearly. Ask for assistance by suggesting, "Perhaps you can help me." These words give the receptionist a feeling of importance and control, and help build a friendship. Ask for the name of the person you need to speak with: "Could you tell me who is in charge of. . . ?" Be polite and patient; arrogance and aggressiveness can ruin your chances at this juncture. If you receive the name, ask if that person is currently available. If not, phone later to make an appointment; an immediate meeting is unlikely. If you get to see the prospect on the spot, without a prior appointment, be grateful for even 5 or 10 minutes. One of the biggest advantages of cold-calling is simply getting your foot in the door, so be satisfied with that. If the prospect is unavailable, find out when they will be. Ask if the secretary schedules their appointments. Ask about convenient times to call back. If not available, use this time to make inquiries about the prospect's business situation. Finally, thank the receptionist by name. This demonstrates your caring and that you do not regard the receptionist as merely an annoying gatekeeper, but an important person.[1] This will help the receptionist remember you, especially over other salespeople who are not as considerate.

One last word about cold-calling: Sometimes the salesperson has to accept a firm turndown and move on to the next call. Many companies have a policy of not receiving salespeople without appointments. If the sales representative did not know this before calling, then it is best to exit gracefully, taking time to leave a card, samples, or any promotional material. Too, it is important to follow up a call—even a negative one—by sending a letter thanking the prospect for their time and cooperation.

8-1c The Telephone

A salesperson's business use of the telephone has two primary purposes: (1) to make appointments with new prospects and current customers and (2) to take care of some routine contacts that do not require a personal visit. Our consideration here is to discuss the use of the telephone for making appointments with new prospects.

Many salespeople find the telephone awkward at first. Because it cuts them off visually from the prospect, it is hard to judge the prospect's reactions in the absence of nonverbal behavior. Salespeople will find it helpful to create a positive mental picture of the prospect before calling by imagining they are about to talk to a friend or acquaintance whom they especially like.

A cardinal principle when approaching new prospects on the telephone is that the sole objective of the phone call is to secure an appointment and not to sell, which is the job of the interview. The secret of effective telephone selling is to arouse interest and introduce the proposition without forcing a premature decision. With rare exceptions, attempts to use the telephone to conduct an interview—or any part of it—will be a disappointment and a waste.

8-2 The Telephone Track

telephone track
The steps of a telephone conversation in which a sales rep seeks to obtain an appointment to see a prospect in person.

The telephone approach (or **telephone track**) is organized so that certain standard phrases can be used in most any conversation. Yet, a "canned" approach—one used on every occasion—is not recommended. Some variation obviously will have to be made because of different products. But standard phrases that salespeople may select (and alter) to fit their own tastes and those of their prospects can be prepared.

The six steps of the telephone track follow. There is nothing magical about these steps. Leaving out one step will not necessarily eliminate getting an appointment, but they have proved generally effective in the hard test of field experience.

1. Precall planning and organization
2. Identifying yourself and your company
3. The lead-in statement
4. An interest-capturing statement
5. Stating purpose of call and asking for an appointment
6. Handling objections

8-2a Precall Planning and Organization

Before picking up the telephone and making the call, salespeople should ask themselves if all homework has been completed. There should be a list of prospects to call, giving each prospect's full name, address, and phone number. This material should be available from the preapproach activities described in Chapter 7. The full name is important because it is surprising how many times the request to speak with "Mr. Smith" is followed by a question like "Which Mr. Smith? R. B. or T. J.?" When the salesperson does not know the buyer's name, it is best to get it from a switchboard operator before being connected to a secretary. Ask the operator, "Who is in charge of. . . ?" and then let him or her connect you. That way, when a secretary answers, you can ask for the buyer by name, increasing the odds of talking to that individual. It is helpful if qualifying has already been completed prior to the phone call; otherwise, it can increase the length of the conversation and decrease the probability of securing an appointment.

Picking the right time to call is important; some prospects are more available at certain times of the day (accountants, for example, are difficult to contact during tax season and doctors are harder to reach in the morning when they may be performing operations). Often secretaries have been instructed to screen calls to their bosses. They are told to give an excuse (e.g., "He is out of the office" or "She is in a meeting now") and take any caller's name and number for the executive to return the call if so desired. They are especially wary of salespeople.

screener
Individual assigned to ensuring that only important contacts are placed through immediately to the executive on the telephone.

Get the **screener**'s name, and ask if it is okay to call them by their first name. You will seem less like a stranger the next time you call. Act like an important person and project that image. When the screener relates, "Ms. Jones is in a meeting," don't ask, "When can I call back?" Instead, try, "Ann, I'm busy today, too, and really would like to speak with her. I can call back at 2:15 or 3:30. Which is better?" Having done this, when you call back, Ann feels almost obligated to put you through because she suggested which time to call.

It's best not to leave your number for a callback unless all else has failed and this is your last attempt; in that case, you have nothing to lose anyway. You should not leave your number for two reasons:

1. The decision maker probably won't call you back and you are compelled to allow him or her sufficient time to do so, which, in any regard, takes you out of control of the situation. When you do call back, there's also a little awkwardness or embarrassment on their part because they didn't return your call.
2. If the decision maker does call you back, you might be on another call or preoccupied in some way and unprepared to make a good presentation. Again, you've lost control.

Another common response from screeners [besides "He (or she) isn't in"] is, "What is this in reference to?" Your response to this question will determine whether you get through to the decision maker. Don't reply with a phrase that makes it obvious you want to sell something:

I just wanted to ask Mr. Jones if he would be interested in a new fax machine.

That will invite the reply:

Mr. Jones isn't in right now.

Instead, lead with the benefits of your product or service:

I have to let Mr. Jones know that he will save with the new Lexmark multifunction unit that does the job of a printer, copier, and fax machine. Is he in, please?

Even better, if Mr. Jones has responded to your prospecting letter or some advertising (for example, a reply card, magazine circling, and so on), you can honestly respond, "Mr. Jones asked us to give him a call. Would you please tell him I'm on the line." You might try a novel approach. "This is Ron Marks. I just read the article about Jim in *Forbes* magazine and have a business opportunity to discuss with him. Is he available?"

One way of winning screeners to your side is by asking their advice. They can usually give you inside information on their companies' goals and needs, so you might say to the gatekeeper, "Kathy, it would help matters if you could tell me a little about your company and its use of faxes before I set an appointment to see your boss." Asking for their advice demonstrates that you value their opinions. Compliment screeners for their help (even a small gift is appropriate) and once you visit their boss, be sure and praise them to him or her.[2]

If all else fails, here are a few tactics used by sales professionals to get past executives' administrative assistants:

- *Sell to the gatekeeper.* A 2000 survey by the Menlo Park, California–based Office Team, a leading specialized administrative staffing service, revealed that 91 percent of executives consider their assistant's opinion an important factor in the employee selection process. Just five years earlier, only 60 percent of executives had felt this way. Imply subtly to the gatekeeper that he or she is absorbing more decision-making responsibility. Suggest that the real buyer get more involved so that if an incorrect decision is ultimately made, the responsibility will be shared. When you're finished, let the gatekeeper know you enjoyed the chat, especially because you know how busy he or she might be.
- When the admin says, "Does Mr. Buyer know you?" you need a compelling answer. If the admin has been instructed *never* to allow someone like you to be put through in a situation like this, you may not have a chance. You'll need a plan B that must include selling to the gatekeeper. Some salespeople will send a letter to the gatekeeper with a letter to the real buyer attached. The letter to the gatekeeper reminds them of the call that was previously made and asks them to put forward the attached letter to their boss.

- Have your boss call the real buyer for the purpose of requesting a meeting, which you will attend. The gatekeeper will be angry and so might the buyer, but you may get your meeting.
- Figure out how to meet the real buyer in another venue, for example, at an industry association meeting or an investor conference.
- Ask an existing customer executive who may know this person to call on your behalf, suggesting a meeting.
- Above all, don't lie. You may get past the administrative assistant, but when she finds out what you did, you've got an enemy on your hands with a lot of influence.
- *Request information from the gatekeeper that will tax their ability to answer.* Suggest both of you call on the real buyer to get the answers to those questions.[3]

The salesperson may want to keep a text of the telephone track close by, especially if he or she is new to the job. This inspires confidence and makes for a smoother presentation. Practice is also a good idea for improving the effect. One of the best ways of practicing is to drill and rehearse the entire track with a tape recorder. While playing back the tape, the salesperson should pay particular attention to delivery. Some suggestions regarding delivery are presented in Table 8-1.

Table **8-1** Suggestions for Telephone Delivery

1. Above all, remember that visual communication is lost over the phone. To compensate, oral skills and listening habits must improve.
2. Your lips should be half an inch from the telephone mouthpiece for maximum effectiveness. Open your mouth wider when speaking on the phone to allow you to enunciate more clearly and to avoid any tendency to mumble. Use simple language and avoid technical terms and slang.

   On the phone, people have a tendency to copy the tone of the other person. Your voice should say, "I am friendly, understanding, and competent." As unconventional as it may sound, one way of doing this is to smile into the telephone. People will note the difference in vocal intonation.
3. Be aware of your rate of speech. Talking too fast creates misunderstanding and mistrust; talking too slow encourages daydreaming by the listener and makes you sound boring and unenthusiastic. Experts think 140 words per minute is about the right pace for the phone. The timing or pace may communicate important clues. A long, drawn-out pace may project indifference, while a short reply can indicate impatience.
4. Use plenty of variation in your tone; people like talking to people, not machines.
5. Let the customer know you are listening by interjecting "yes," "uh-huh," "I see," etc.
6. Voice tone or *vocal factors* include pitch, tone, volume, rhythm, and inflection and are a critical part of the message conveyed on the phone. If the voice is "raised," an emotion of frustration or anger may be communicated.
7. Voice pitch can communicate a lot about style and emotions. Anger and excitement tend to cause the voice to rise, which may communicate frustration and anger. A low-pitched voice or speaking in a monotone may communicate indifference, laziness, or even incompetence. Make sure your voice is neither too low nor too high-pitched (i.e., squeaky).
8. Positive language includes the use of such words as "can," "will," "shall," and "certainly." Energy and expression should be put into the voice.
9. If the rhythm of the voice is unsteady or too fast, the greeting will be hard to follow or even lost entirely. Therefore, the rhythm should be comfortably paced and steady. Friendliness is conveyed through voice tone—by inflection at the end of statements with a lilt in the voice. The voice should have clarity so the caller will have no trouble understanding. The deliberate clarity of the voice is necessary for the communication of a friendly greeting with an offer of help.

Sources: Darryl M. Smith, "What Do You Say after You've Said Hello," *Sales & Marketing Management,* 1977; Leon A. Wortman, "Eight Keys to Telephone Sales," *Marketing Times,* September–October 1981; Art Sobczak, "How to Be a Success in Telephone Sales," *Personal Selling Power,* March 1990, p. 41; Mark Edward Jensen, "Enhancing Telephone Communication in the Dental Office," *The Journal of Contemporary Dental Practice,* Volume 1, No. 1, Fall Issue, 1999.

8-2b Identification

The attention-getting effort begins when the prospect answers the phone and the salesperson introduces himself or herself. The introduction contains three elements: the prospect's name, the salesperson's name, and the salesperson's company. Personally, I recommend that the company's name be emphasized slightly more than the other two, as it will carry the most prestige and credibility at this stage of the call. Given my experience, I also suggest that the salesperson's last name be mentioned twice. Otherwise, it tends to easily be forgotten by the prospect. Accepting these two recommendations, an introduction might be phrased as follows:

> *Mr. Jones?* (slight pause) *My name is Friendly, Ron Friendly, of* (emphasize) *the Superior Hospital Uniform Corporation.*

All of this may sound like no big deal, but if you don't say it correctly or clearly, then while you are talking, the prospect will be thinking, "Who is this?" Needless to say, your well-thought-out presentation will be for naught.

The introduction's delivery is especially important. Enthusiasm and a clear, audible delivery are especially critical at this early stage of the phone interview. Once the introduction is concluded, the salesperson should speed up the rate of conversation. The likelihood of getting a "no" or "I'm not interested" is particularly great at this point, and the salesperson can decrease this probability by accelerating into the lead-in.

8-2c The Lead-In

This is a critical part of the telephone track. A request, such as, "Hi, I'm just calling to check in with you" or "I'm Ron Marks, sales representative for Northern Life Insurance" are sure to end without an appointment.[4] A lead-in statement should immediately follow the introduction. Material in the lead-in may include:[5]

- A third-party reference
- Literature sent to the prospect by the salesperson or the company
- The prospect's or the salesperson's recent company advertising
- A statement of a known problem in the prospect's industry or profession
- Pertinent points made by a recognized figure in the prospect's industry at a recent conference or in an article
- The inactive account approach

A good third-party reference is probably the best lead-in. For instance: "Mr. Holiday [purchasing agent for Mercy Hospital]? My name is Friendly, Ron Friendly of the Superior Hospital Uniform Company. I was with Sam Barry over at Baptist Hospital yesterday, and he mentioned that you might be interested in our new surgical uniforms."

Third-person references can be business friends or acquaintances of the prospect. It is helpful if the third party is at least at the same career level as the prospect. References of a lower rank will not carry nearly as much weight. The best sources of references are, of course, current customers—satisfied ones. The worst thing a salesperson can do is mention customers only to find out that they are dissatisfied, so it is mandatory to check with them first. A phone call or letter to these references also may reveal important qualifying or preapproach information about the prospect.

Another effective basis for the lead-in is mail from sales representatives or their company. Asking if they have had a chance to read the literature (whether or not they have) compels prospects to at least answer the question. Their answer allows the salesperson more time to develop the presentation. For example, after the introduction, the salesperson might proceed:

> **Salesperson:** Within the last couple of weeks, you received a letter concerning our new surgical uniforms. Did you get a chance to read through it, Mr. Jones?
>
> **Prospect:** No, I didn't.
>
> **Salesperson:** OK, well as long as you have it there, why don't you grab it and let's go through it together.[6]

(Now the salesperson makes an interest-capturing statement.)

Lead-ins based on media advertising or industry problems also may be effective, and readers may wish to create such messages in their minds. If they are well done, they can be as effective as the third-party reference or mail approach. If none of these lead-ins is possible, then the salesperson might choose to rely on the company's reputation to capture the prospect's attention. This may be effective if the company is well known, but the salesperson should use other lead-ins if possible.

In spite of what you might think, inactive accounts can often lead to renewed business. A company's new supplier, for example, may not have worked out as hoped. If there were problems in the past, a salesperson could say, "I was looking over our records recently, and I notice we have not done any business with you lately. Is there a reason for this? Can I stop by and discuss matters with you?" You will be surprised at how many inactive accounts can be revived.

8-2d Interest-Capturing Statement

Once the salesperson has attracted the prospect's attention with a lead-in, a short statement is needed to arouse interest. The objective is to give the prospect a reason to continue the conversation.

The statement might be a benefit statement, which would include (1) a major benefit of the product or service and (2) the product feature from which this benefit evolves. For instance, the sales representative might say:

> *Mr. Jones, the new Superior polyester-cotton blend uniform will substantially reduce your hospital laundry costs because of its "no-iron" feature.*

Hopefully, the benefit mentioned will be the prospect's most pressing need, but there is no guarantee that it will be. A good preapproach may reveal some clues, but in the final analysis salespeople must make an educated guess and take their best shot.

A statement is not the only method of capturing the prospect's interest. The salesperson might also ask a question, such as, "Mr. Jones, if you could have the perfect surgical uniform, what would it be like?" This only represents one possibility. The salesperson might wish to phrase the benefit statement as a question, such as, "Would you find it valuable if you didn't have to iron your uniforms?" There are a great many opportunities for creativity here. One software company discovered the value of using questions. The software was designed for graduating high school seniors to show them sources of loans, grants, and scholarships. They had been using a one-way, 15-minute presentation with limited success. Instead, they changed the whole format to begin with a congratulatory opener: "I understand Johnny's graduating from high school. Congratulations. That's a pretty big event, isn't it?" (After the reply) "I just wanted to share a little information. We've been able to help high school seniors finance their education more comfortably. What college is Johnny thinking of attending?" (After reply) "About how much do you think that's going to cost you each year?" (After the typical reply of "too much") "If I could show you some sources of loans, grants, and scholarships, how much more comfortable would that make financing Johnny's college career to you?" The result: a tenfold increase in sales.[7]

Some additional examples of interest-capturing statements follow:

> *Mr. Doe, we have a special offer on case lots of ABCs this month. You'll save more money by ordering by the case.*
>
> *Our new . . . can save you lots of time and work space for your . . . , Ms. Whitehall.*
>
> *You know, Ms. Smith, we have redesigned our . . . packaging. Now it's a perfectly round cylindrical shape that tapers toward the bottom. The increased attractiveness has improved sales 25 percent in most of our stores.*
>
> *Mrs. Brooks, I've worked with many banks in the area and have shown them how to increase their bottom-line profits by decreasing their accounts-payable expenses.*
>
> *How would you like to cut your automobile insurance in half?*

8-2e Stating Purpose and Asking for an Appointment

Following an interest-capturing statement, the salesperson should state the purpose for making a personal visit and ask for the appointment. Typically, the former follows logically from the interest-capturing statement. Continuing with the interest-capturing statement used earlier, Ron Friendly might say:

> *Mr. Jones, the new Superior polyester-cotton blend uniform will substantially reduce your uniform laundry costs because of its "no-iron" feature.* (interest-capturing statement) *Can we meet next Wednesday at 3 or Thursday at 10 to discuss this feature and the many others you should find attractive?*

In stating the purpose, it is important to remember that the objective of the phone call is to secure an appointment. Giving away too much of the proposition over the phone runs the risk of a turndown before the salesperson can make a proper presentation in person. The rule is to provide just enough information to create a desire to learn more. Should the prospect ask for more information, the salesperson can respond with something like, "For full development of the idea, I frankly need more time. Investments have become such a complex subject these days that I really need to talk with you in person." When seeking an appointment time, as Ron did, it is advisable to offer two choices. Should you propose only one date, you give prospects the choice between meeting you that day or not at all. They can always say they are too busy to see you, but if you offer two dates, experience demonstrates that you increase your odds of getting an appointment. Moreover, suggesting next Wednesday or Thursday implies that the salesperson is a busy person. A prospect thinks, "Busy people are more successful than people who have a lot of time on their hands." Having once secured the appointment, the salesperson should end the conversation, confirming the date and time: "I'll see you Thursday at 10, then." This serves as a reminder to the prospect and allows a graceful cessation of the conversation. Continuing might only end with a cancellation of the appointment.

When seeking an appointment, it is critical to avoid the use of "weasel" words such as *maybe, if, could, possibly, perhaps,* and *like.* Imagine what the prospect thinks when these words are used. For example, you might call for an appointment and say," *Maybe* I could stop by on Thursday?" This is too weak; the prospect is probably saying to himself or herself, "And then again, maybe not!" To emphasize the point, let's put all these weasel words together.[8]

"*Perhaps* we *could* get together *if* you *might* have a few minutes, and *possibly*, we *may* be able to see how my product *could* be of benefit, and I'd *like* to stop by tomorrow, *if* you don't mind."

8-2f Handling Any Objections

Any reason that the prospect might give for not granting the interview is considered an objection. Chances are the salesperson will not be able to overcome the objection without revealing much about the proposition, so the goal in a telephone approach is to set up an appointment rather than solve the customer's problem. Instead of answering the objection, the objective then is to use it as another reason for granting the interview. (Table 8-2 details some common objections and ways of handling them.)

However, realistically, the timing may not always be right for prospects. Wouldn't it be great if every prospect became a new customer around our time line? It's a safe bet that some of the prospects you call on will not be ready to take that next step with you, at least not just yet. Better to respond to a real objection about bad timing: "Mr. Prospect, thanks again for your time today. Before we wrap up this conversation, I've noticed that in the past, when I have attempted to reconnect with someone months after our first contact, many things have happened. Changes in their position, in their company, or in their life often have the tendency to divert even the best-laid plans. Since there are so many things that can happen in two months, I was hoping that I could stay in contact with you without stepping over the line and being annoying about it. With your permission, can I contact you from time to time with updates about our product or valuable information that you may find of interest as it relates to your business?" A monthly newsletter (perhaps via email), an article of interest, collateral material, or a great new product feature are just a few ways to deliver value during this "downtime" and keep your finger on the

Table 8-2 Some Common Telephone Objections and Ways of Handling Them

1. Objection:
   "Can't you mail the information?"
   Reply:
   "Well, everyone's situation is different, Ms. Smith, and our plans are individually designed to meet the needs of each customer. Now . . ." (Go on to a benefit statement and request an appointment.)
2. Objection:
   "What is it you want to talk about?"
   Reply:
   "Mr. Prospect, this is an idea that is difficult to explain on the telephone and . . ."
3. Objection:
   "You'd only be wasting your time" or "I'm not interested."
   Reply:
   These objections are general, and they may be hiding a specific objection that the salesperson should attempt to uncover with a reply such as: "Do you say that because you're not in the market for a new copier, Ms. Donovan?"
   Such a question may uncover that prospects have had bad past experiences with the salesperson's company, that they think prices are too high, etc. These specific objections may then be dealt with individually by the salesperson. But remember, don't go too far. Your main objective is to get an appointment!

pulse of every prospect you speak with.[9] This way, if things change on the prospect's side, you won't be the last person to find out.

8-2g Voice Mail

VIDEO

For Lauren Januz, it seemed like a sure sale. She got a tip that a major Chicago college could be a good prospect for the monogrammed pens, pencils, tote bags, and other advertising specialties her firm markets. She called the director of marketing services at one university, received a voice mail message, left her name and phone number, and awaited a reply. After no response, she called again, got voice mail once again, left a message, and received no return. Becoming frustrated, she sent a customized introductory letter. Still no response. After two weeks and 14 voice mail messages, she had still to make contact.[10] Says Januz, "Voice mail has done a horrible disservice to the selling profession. Middle managers are using voice mail as a way to shield themselves from phone calls. And instead of callbacks, they just ignore the messages."

The reality, as this story relates, is that it's getting more and more difficult to contact prospects in the age of voice mail. Middle executives and purchasing managers, swamped with additional responsibilities because of downsizing, have less time to meet with salespeople in person, let alone on the phone. Like it or not, sales reps have no choice but to seek the best ways of dealing with voice mail. How can they increase their chances of receiving return calls? What types of greetings increase their chances? Unfortunately, there are no easy answers.

First, some mechanics. If you get an automated attendant ("If you know your party's extension, please press it now," etc.), just press the "0" button to get the operator. Get the direct phone number of the person you are calling, and then dial it. If you get the secretary, find out when the person will be back or the best time to reach that person. Failing this, if no secretary is available and you have to leave a voice mail message, use a referral or explain a special, individualized benefit your product or service can offer, or even better, both.

If you have to leave a voice mail message (or answering machine message, for that matter), make sure it has impact and gets your prospect's attention—enough to return your call. Give them a strong reason (one that's important to them) to return your call. Usually this means providing a referral and a benefit. For example, compare the impact of the following two messages:

Message 1:

"This is John Smith, sales representative, at ABC Corporation. Give me a call at 233-2165 when you return."

Message 2:

"Hello, (insert name). This is Tim Neumann, TBN Sales Solutions, (920) 555-1306. I'm sorry I missed you. I'm calling to introduce my company to see if we can help. TBN Sales Solutions increases commissions for salespeople and profits for businesses through customized training, coaching, and consulting. We establish structures and procedures, through classroom workshops and individual sales coaching, to teach reps to control their own destiny, thereby impacting the bottom line. Please call me. I've cleared my schedule tomorrow morning at 9:30 and tomorrow afternoon at 1:45 to provide the details to you. Your friend Bob Smith at Butler has taken advantage of this opportunity and invested with us. Again, Tim Neumann, TBN Sales Solutions, (920) 555-1306. Thank you."

A few quick tips for leaving voice mail, as evident in message 2:[11]

1. Speak slowly, but enthusiastically. If you aren't excited, the prospect won't be.
2. State your name, company, and phone number at the start and at the end. Nothing is worse than when someone is interested in your product and they have to play the message 10 times to catch your name and number.
3. State your desire to "help." As we said last month, it's a powerful word.
4. Provide a choice of times. If the caller expects a response at specific times, the listener is likely to feel more of an obligation to return the call.

8-2h Think about Selectivity (Knowing When to "Back Off")

On average, salespeople close 17 percent of their appointments. In many industries, closing rates are much lower. However, most salespeople keep hoping that they'll get better at persuading interested prospects to buy. When you're doing something that has a small probability of producing a positive result, an occasional payoff will get most people to keep doing it. The vast majority of people who keep putting their money in slot machines will lose all of their money in a short time. The lure of the big win combined with a few small wins keeps them hooked. They keep hoping that they'll become more skillful and learn how to beat the odds. That's the principle that enables gambling casinos to earn billions of dollars a year.

If you spend your time only with prospects who want what you're selling and who will make a commitment to buy if it meets their requirements, you have broken this pattern. You should stay in touch with a large number of prospects by frequently calling them all or send "opt-in" email. For most industries, the best frequency is every four weeks. Each time you call your prospects, you should present them with a different prospecting offer than the previous one. That will minimize the likelihood of their being annoyed with your calls. New information isn't annoying unless it's used for manipulative purposes. Each time you call, you must be willing to accept "No" for the answer and be willing to move on to your next call, quickly. Each successive time that you call, your chances of contacting the prospects who want to buy increases.

The best time to visit with a prospect is when they are ready to buy (or specify) your type of product or service. If you visit with prospects when they are not ready to buy, your chances of selling to them are small. If you wait to visit them when they are ready to buy, it's more likely that you will get their business.[12]

8-3 Establishing Rapport

After gaining entry to the prospect's office, the second major task of the approach is to establish rapport with the client, as outlined in Table 8-3. Relationship selling requires a free and honest exchange of ideas and feelings between prospect and salesperson. This cannot occur unless a receptive communications climate has first been established. In an unreceptive climate, one or both of the partners has set up barriers to communication. Most frequently, this happens because the prospect does not completely trust the salesperson. At the first sign of insincerity, the prospect establishes a barrier and refuses to interact further with the salesperson.

Table 8-3
Physical Gestures toward Establishing Rapport

This is a Largely Nonverbal Art, so be Mindful of Your:

- Appearance
- Handshake
- Posture
- Eye contact
- Small talk
- Etiquette

The trouble is, you don't have much time to establish a credible image. Some experts suggest as short as 10 to 15 seconds; others, up to 4 minutes.[13] During these few seconds (or minutes), prospects form immediate impressions about whether salespeople are worth getting to know better. Although frequently unconscious of why they instantly like or dislike a rep, experts attribute it to the nonverbal messages reps send—appearance, posture, eye contact, smile, handshake. If bad signals are sent out, as the old adage goes, "You never get a second chance to make a good first impression!"

Young sales reps—and even older reps who appear to be very young—have trouble earning respect in today's competitive sales landscape. As a result of such circumstances, one young female rep goes to great lengths to look older. She wears an ultraconservative suit and pulls her hair back in a ponytail at the nape of her neck when visiting clients. She covers her freckles with makeup. And she makes sure to flash her wedding band and talk about her husband, tactics that she hopes are proof she's older than she looks. Indeed, cultivating a mature look can help young-looking sales reps to gain more clout. "Like it or not, prospects judge you in the first 10 seconds you walk through the door," says Kelley Robertson, president of The Robertson Training Group, a sales training firm. "If you look like a kid, they're going to ask themselves, 'Is this person qualified to help me with my purchase?'" The biggest mistake youthful-looking salespeople can make, Robertson says, is dressing too trendily. He recently coached a sales rep in his twenties who worked for the Sony Corporation on how to tone down his attire. Another way for young-looking reps to earn respect quickly is to talk the part of a mature salesperson. That means avoiding slang, speaking with a deeper voice, and talking slowly.[14]

8-3a Appearance

Appearance is critical. Although casual wear may be inching into the corporate world, sales reps should be very cautious. They should know the prospect's (and his or her company's) style, before throwing on their favorite khakis. "I am not impressed by someone who shows up in a warm-up suit or jeans," says Joe Weldon, marketing manager of cellular equipment at BellSouth in Atlanta, who makes million-dollar purchase decisions. "They are representing their company, and if they create a less than professional image, I tend to perceive their company that way."[15] Appearance also extends beyond just the salesperson's dress. For example, a sales representative may create a poor impression by handing the receptionist a grimy business card instead of a crisp new one or by pulling an obviously worn sample or a crumpled flyer out of his or her briefcase. Something as small as an appointment book may detract from a positive overall image. If it bulges with scraps of paper that fly off in the prospect's office, it is distracting at least and self-defeating at worst. Another way to create a poor impression is to take a prospect to lunch in a cluttered car. Trash and samples scattered indiscriminately throughout the vehicle will not give the impression that the sales rep is a professional. In selling, everything about you adds to—or subtracts from—the total impression you make. Even small things can make a big difference.

8-3b Handshake

What a sloppy handshake says about the person behind the hand is that he or she just doesn't have things together. If you're the sloppy shaker, you're telling the client, boss, or interviewer that you have problems. That conclusion can lead him to make a subconscious decision that he doesn't want to do business with you—or that you won't make a good representative of his company. What is a proper handshake?

The act seems so simple, yet people get confused over how to do it. In the United States, you're expected to offer a firm handshake and make eye contact at the same time. A firm handshake with good eye contact communicates self-confidence.

VIDEO

In U.S. etiquette, an appropriate handshake begins with the introduction:

1. Extend your hand and grip the other person's hand so that the webs of your thumbs meet.
2. Shake just a couple of times. The motion is from the elbow, not the shoulder.
3. End the handshake cleanly, before the introduction is over.
4. If you want to count, a good handshake is held for three or four seconds.

Shaking hands can be awkward in some situations. Should you be introduced to someone when your hands are full, carrying files or other packages, don't try to rearrange everything. Simply nod your head as you respond to the introduction.

If you have a tendency to have cold hands, stick your right hand in your pocket to warm it up as you approach a situation in which you'll have to shake hands. If you have perennially clammy hands, try the high school prom date approach and take a quick swipe of your right hand on your skirt or trousers, so that when you present it, it's dry. You can do so quickly and gracefully, and no one will be aware that you made the gesture.[16]

If the prospect's hand is offered, be sure not to abuse the privilege. Many salespeople practice such abominations of the art of handshaking as "the bone crusher, the pump handle, the limp digits, the wet rag, and the no-release clamp." Shake hands firmly but without these abuses. Be aware of how much of the hand is involved in the shake. Only offering the front half of the fingers says, "I don't want to become too involved with you." Palm to palm, web to web is a safe choice, and, of course, no sweaty palms.[17]

8-3c Posture

Posture can be interpreted as a window into how salespeople view themselves and the products or services they are selling. When the body is held in an upright position—erect stance, head straight, shoulders pulled back—it projects confidence, competence, dignity, and enthusiasm. In contrast, a slumped body—rounded back, bowed head, slack shoulders—sends out the wrong image (i.e., insecurity, disinterest, and lack of conviction). It is of further import how weight is distributed. Feet should be shoulder-width apart, knees slightly bent and relaxed; do not rock or sway.[18]

8-3d Eye Contact

Eye contact is a further important element of first impressions. In our society, the salesperson should make immediate eye contact. If handled correctly, early eye contact projects honesty, sincerity, and attentiveness. In contrast, failure to make eye contact may be interpreted as sneaky, dishonest, or insincere. Furthermore, a relationship can begin badly if eye contact is held either for too long or too short a time. Rapidly moving one's eyes is perceived as sneaky; a prolonged gaze is perceived as threatening. What is the right amount of time? No more than three seconds on average. Then, break contact briefly.[19]

8-3e Small Talk

VIDEO

small talk
A discussion between sales rep and customer on such topics as hobbies or sports that are unrelated to the sale itself.

Often there is tension present in the first meeting between prospect and salesperson. For this reason, many sales representatives begin their conversation with **small talk**—a discussion of topics such as hobbies or sports that are basically unrelated to the sale itself. If the sales representative knows from the preapproach that the prospect is an avid tennis player, there is no harm (and probably much good) in discussing Andy Roddick's chances at Wimbledon. Behavioral research supports such a strategy. Finding an initial point of agreement with people improves the chances of persuading them to your way of thinking regarding a later point of discussion.

It is also true that prospects may reveal more about themselves and their company in small talk. Often they are less guarded and more open than in a strictly business conversation. Clues about quality concerns, price expectations, and service desires can appear in small talk. For example, when Mary Baker, sales representative for a textile company, first called on a buyer at a furniture upholstering company, she noticed the man's desk was littered with new-car catalogs. She began, "It looks as if you're getting ready to buy a new car." After a short conversation that revealed the buyer's concerns about fuel economy, "sticker shock," and whether a certain salesperson would call back with a better deal, Mary decided she had a price-sensitive buyer on her hands. Similarly, if the man had concentrated on the quality of German cars, the importance of the dealer's service department, and extra features, such as air-conditioning, a sunroof, or white sidewalls, she might have concluded differently.

Accordingly, topics for icebreaker conversations can be:

- A personal interest of buyers or their families, if the salesperson has such information from the preapproach
- A sincere—and deserved—compliment about the prospect's plant, products, office, or community activities
- Some pleasant news about the industry—favorable legislation, economic upturns, or new technology

If small talk is engaged in, there is always the problem of making the transition to business matters. It is important to recognize when the prospect wishes to change the conversation to business. Nonverbal clues should be noted. The salesperson should not wait for prospects to say, "Let's get down to business," by which time they may be annoyed. It is better to let small talk lead logically into discussing business. For example:

> Speaking of box scores and batting averages, Dave, I brought along some statistics on the wear quality of the new uniform I showed you a couple of weeks ago . . .
>
> If you're right and the stock market does rebound next month, you'll probably see an increase in machine tool orders. We've already had some inquiries from customers who had things on hold, so . . .
>
> I could sit and talk golf for hours, Bob, but I know you're busy, so let me show a new item in our line that should increase your impulse-purchase sales . . .

Sales representatives should be careful before automatically plunging into small talk in each and every sales call. Some buyers do not appreciate discussion of anything but business matters. With regard to the personality profiles introduced in Chapter 4, "Buyer Behavior," Drivers are interested in the job and nothing else. A sales representative who spends time discussing golf or tennis will appear a lightweight in a driver's eyes. Even with buyers typically interested in discussing unrelated matters, not every interview presents an opportunity for small talk. They might be pressed for time and want to complete the interview as swiftly as possible.

Small talk, when used appropriately, is but one effective way of reducing tension during the approach. Some other suggestions follow:

- Assure the prospect that no high-pressure or manipulative techniques will be used.
- State that the interview will not take long.
- Discuss a mutual acquaintance with the prospect.
- Ask the prospect's advice on a particular matter.
- Use humor.
- Flatter the prospect (do this carefully).[20]

There are other more general ways to put people at ease. As indicated in Table 8-4, these apply to any social situation, sales call or otherwise.

8-3f Etiquette

Salespeople should follow certain standards of etiquette while interviewing clients. Some are basic, but it is surprising how often salespeople abuse them—to their disadvantage.

We have already discussed the importance of appearance with regard to the salesperson's clothing. The car the sales representative drives also contributes to appearance. Driving a nice but not flashy car is a good idea. Flashiness awakens in the buyer's mind those harmful elements of the sales representative's stereotype. It also makes the buyer question whether salespeople and their companies are overcharging their customers.

It is a matter of courtesy not to demand to see the buyer. Professional buyers will see the salesperson as soon as possible. Pushing them will only lead to their finding reasons not to see the sales representative.

A critical part of sales etiquette is remembering the buyer's name. Forgetting a name may be interpreted by buyers to mean that in the salesperson's eyes they are

Table 8-4 How to Put People at Ease

Putting people at ease is a basic step in getting people to react favorably toward you, says Dr. Arnold Lazarus, a psychologist at Rutgers University. He offers these suggestions:

- Let people hear your voice. Don't just nod. The sound of the voice is like a calling card or introduction.
- Avoid talking too much or too little. If you tend to be too quiet, use more words. If you are a compulsive talker, try to summarize. Others often like to hold the floor themselves.
- Use the word "I" in your conversation. You are much less of a mystery when you disclose something about yourself.
- Look for something you can comment on positively. Pick something that you genuinely like about the other person and point it out to him or her.
- Be able to laugh at yourself. If you tell a story in which you do not come out in a particularly good light, other people will immediately warm up to you.
- Let your face express your feelings. If it is a mask, you are not going to put anybody else at ease.
- Make eye contact with the other person. By looking up at the ceiling or down at the floor while speaking, you make your listener feel ill at ease.

not worth troubling with or are not important. Yet, it is difficult for salespeople to remember the names of all the people with whom they come in contact. Here are some suggestions for easing this arduous task:

1. Hear the name.
2. Ask the person to spell it.
3. Say something about it.
4. Use the person's name in the next few minutes.
5. When you depart, say the name.

As a further aid to remembering, make a pictorial image of the buyer's name. To be effective, the image should be (1) ridiculous, (2) vivid with motion, (3) exaggerated, and (4) tied to the person's dominant feature. If he is a bit on the portly side, Mr. Earl becomes "the Earl of Ham," and so much the better. "Gordon" can become "garden," and if Mr. Gordon has a large nose, an image can be formed of a garden growing over his nose. If the prospect looks as if he has a pit in his head like an olive, then it is easy to remember his name as Oliver.

If making a picture is difficult for you, another way you can remember a name is to tie it to one you have already run across. Mr. Moriarty might be remembered because you ran across the villain Professor Moriarty in Sir Arthur Conan Doyle's Sherlock Holmes novels. Similarly, if Ed Cruise bears a striking resemblance to movie star Tom Cruise, then recalling his name should be relatively easy.

Don't treat someone's office as your home turf. Wait until you're invited to sit down, and then ask the other person where they prefer for you sit. Don't fiddle with things on their desks, and watch where you put yourself and your belongings. If you're going into someone's space, you really need to be respectful. Do put cell phones, pagers, and BlackBerrys on hold. Checking messages, taking calls, or checking email are to be avoided. How are you going to solidify relationships or build business if you're giving the impression that everything in the world is more important? If you are expecting an urgent call, alert your companion to the fact beforehand, ask for permission to handle the call, and then excuse yourself when the call comes in.[21]

It is further a part of sales etiquette for sales representatives to thank prospects for taking time to see them, and salespeople should be properly appreciative. This should help establish a receptive communications climate and an image of the salesperson as an empathetic individual. But this appreciation should not be delivered apologetically. Remember, the salesperson is providing a benefit to the buyer!

The salesperson should be attentive to certain habits and mannerisms that are potentially annoying to prospects. Continually using words and phrases such as *now, well, frankly,* and especially *you know* is enough to distract even the most forgiving buyer. Certain physical mannerisms fall into the same category: pulling one's chin, mouth, or nose; drumming one's fingers; straightening one's tie or skirt; or clicking a pen. Although it is easy to overemphasize the importance of these distractive habits, there is no question that professional salespeople rarely manifest such characteristics. Through practice and experience, they have gained the confidence that curbs such nervous mannerisms.

Though the salesperson should be friendly, there is such a thing as overdoing it. A buyer should not be addressed by his or her first name unless so requested. Salespeople should not take a chair until invited to do so. Buyers should not be touched on their shoulders, arms, or legs. Nor is it professional to engage the prospect's employees in idle conversation that keeps them from their duties. Should the salesperson need to use a prospect's equipment for a demonstration, permission should be sought first and an effort should be made to protect it from damage.

Honesty is another important part of sales etiquette. If the salesperson does not know the answer or does not have the solution to the buyer's problems, honesty is the best policy. Telling buyers the truth is much better than making the buyers look bad later in the eyes of their own management because they were sold a solution that failed. Candor is an element of trust and must be cultured to develop the relationship.

The professional salesperson does not waste a buyer's time. Sales representatives should learn to tell how busy the buyer is and adjust the length of the sales call accordingly. They should learn the buyer's procedures to find the best time of the day or week to call. It is important for salespeople to establish sure ways by which buyers can reach them. Nothing is more discouraging to a buyer than to hear an answering service announce several days consecutively that the salesperson cannot be reached. If prospects are likely to have a problem requiring immediate attention in the near future, the sales representative should arrange to reach them personally before going out of town.

8-4 Gaining Attention

Having established a receptive communications climate, the task of the salesperson is to capture the prospect's attention. The sales representative must say or do something that will compel prospects to stop whatever they are thinking or doing and pay heed. The opening statement is like the headline of an advertisement—it should project an important reason for listening so that the prospect will believe that not listening to salespeople carries a greater risk than attending to what they say.

But gaining the client's attention is not always easy. Many buyers, especially professional ones, have learned to sit upright at a desk, look intently at visitors, and nod from time to time, while all the while their minds are far away. Prospects (be they purchasing agents, executives, or shoppers) have countless things on their minds. Although the body may be present, the mind of the prospect can be somewhere distant.

If you were a buyer, think about how you would react to a salesperson who opens with, "I happened to be passing by and thought I'd drop in for a minute" or something similar. It almost says, "What I have to say isn't very important, but I have nothing better to do and you probably don't either, so here goes . . ." Not only does such an opener detract from the presentation that follows but it is also disrespectful of the buyer's time—and it is decidedly unprofessional. In a very real sense, a sales call is like a novel. If the reader's attention is not piqued early, he or she may never finish the book. The salesperson must do or say something that will pique the buyer's immediate interest. But it is important not to go too far in this direction. If the mindless opener characterizes one extreme, then showy or gimmicky approaches represent the other. They may attract immediate attention, but the wrong kind.

The classic in this regard (not to mention outright gall) comes from the early days of cash register sales. Salespeople used to be taught to walk into a prospect's store, deliberately go over to a hook where charge slips were stuck, tear off one, and throw the slip onto the floor. After the storm subsided, the salesperson would express surprise that the merchant was so concerned with one charge slip, when more money was undoubtedly lost through the loose cash management that characterized merchants of that time.

Another common approach is for the salesperson to announce some sort of benefit that the prospect will gain from the product or service. The salesperson might state, for example, "I can save you *X* amount of dollars by your using our machine." Such a statement implies that the sales representative knows how to perform the prospect's job better than the prospect does. Although this might be all right in those rare instances when prospects look up to the sales representative as an expert, in most cases they are unlikely to react favorably to such a patronizing declaration.

Most people are turned off when someone implies superiority over them. In the approach, it is not a good idea to imply that the salesperson knows all about the prospect and what is good for him or her. One sales representative related how, as a young man, he called on an architect. After hearing the architect's plans for a building, he replied, "You can't do that." The customer answered, "Young man, never tell people they can't do something."

Besides the problem of implied superiority, both the showmanship and declaration approaches smack of the old stereotype. They make the prospect think about all those old stories about lying salespeople, and this establishes a barrier in the prospects' minds. They become doubly wary of placing their trust in the seller.

For these reasons, it is recommended that salespeople use questions in their approach, if at all possible. There are a number of advantages associated with this technique. First, the use of a question does not suggest superiority—you are asking, not telling. Moreover, there is nothing more attention-getting than participation. Merely listening to a presentation versus participating in it makes a world of difference in attentiveness. There are few things that grab our interest more than talking about ourselves and our own projects. This human tendency provides a further advantage to the questioning approach—prospects are likely to reveal much about their needs and problems and this, of course, is what the salesperson is after in the early stages of the interview.

To illustrate the value of questioning over telling in openers, compare the following two approaches for an office-machine salesperson.

> I'd like to tell you about a laser printer that comes as close as possible to being the perfect printer—certainly the best on the market.

Versus

> If you could design the perfect printer, what would it be like?

Which approach do you think would gain more attention? Which would the buyer find less offensive? Which would leave him or her more open-minded?

Openers exist in an infinite variety. Although the following collection is not complete, enough are presented so that the student of selling should never suffer for want of an opener. In most instances, the openers have been structured in the form of a question.

8-4a The Introduction Approach

In this simplest—and probably weakest—of approaches, a salesperson announces his or her name and company and perhaps hands the prospect a business card. The introduction approach may also extend to a mention of the topic for the call, such as follows:

> *Mr. Prospect, my name is John Bleak and I'm with Fox Papers. My company has just introduced a new coated paper of especially high quality. May I tell you about it?*

Such an opening is unlikely to generate much attention and enthusiasm. Unless the introduction is followed by another attention-getting statement, it usually is not sufficient in and of itself.

Handing the prospect a business card at this point helps them remember the salesperson's name and company. Others think a business card can be distracting and recommend giving the card at the end of the sales call. Innovative sales reps are beginning to use business cards that are also mini-CD-ROMs, holding up to 600MB of information and may include video clips and HTML links.[22]

8-4b The Referral

Citing the name of a third party, especially a satisfied customer, is an effective method of face-to-face approach, just as it is when phoning for an appointment. It is even more effective if the reference is an acquaintance of the prospect, in which case the prospect feels obligated to pay attention. A salesperson might phrase such an opener like this:

> *The Acme Company just leased a system from us, and Sue Jones, their data-processing manager, suggested that your situation might be similar to theirs.*

The referral may be embellished with a written testimonial letter that the sales representative hands the prospect. One creative sales representative even tape recorded a message from a reference.

In the event the salesperson does not have a referral from a friend of the prospect, he or she can use the name of one of the prospect's competitors who is already a client: "Mr. Brown, has Fred Miller ever mentioned my name to you?" Now, it isn't likely that Miller, his competitor, would have talked about him or her; however, mentioning Miller is an icebreaker, and Brown is probably interested in knowing what his competitor is up to.

8-4c Offering a Benefit

Offering a benefit is probably the most widely used type of opening, and it is a good one if the benefit is of real interest to the buyer. An example follows:

> *XYZ has some exciting new copiers you may want to look into, because we're now designing copiers for specific jobs done in businesses such as yours. The benefit to you is that equipment designed for your business makes your employees more efficient. Wouldn't you like to see happier employees who get their work done sooner and can then work on other jobs you normally have to let slide or pay extra to have done?*

The benefit approach is especially valuable if it is addressed to the buyer's dominant buying motive, because this leads logically into the presentation.

Statements that combine mention of a satisfied customer along with a benefit are an effective form of benefit statement; they offer evidence of the benefit. For example, a salesperson for a plastic container company talking with the purchasing agent for a food firm might say:

> *Linda Fitch, marketing manager for Farmland, was telling me just yesterday that they've increased their sales in certain items because of packaging in plastic containers. She says buyers find the containers easier to store on crowded pantry shelves and easier to dispose of after use.*

The salesperson can turn the statement of the benefit into a provocative question: "How would you like an extra secretary for just $30 a week?" So asks the salesperson for a digital copier, who then proceeds to show how two of his or her machines will increase the output of two secretaries by 50 percent.

8-4d The Curiosity Approach

Another effective approach is through appeal to the prospect's curiosity. A salesperson might ask the prospect, "Would you like to see the product your neighbors are buying?" or, "This bit of wire cost the Blank Company more than $250,000 last November. Want to hear about it?" Wouldn't you? The salesperson can then proceed to tell how a short circuit caused a $250,000 blaze.

An investment salesperson I recently met handed me his business card. In the lower left-hand corner, the number *12,639* was printed in boldface. When asked about it, he replied, "That happens to be the number of meals you'll buy after age 65 if you live a normal life expectancy. If you pay just $4 per meal, you'll need at least $50,556 for you and your spouse. Would you care to spend a few minutes discussing retirement investments?" We did.

8-4e The Compliment Approach

A compliment represents still another approach, but the salesperson must be careful in employing the opening. Nothing is more obvious or more offensive to prospects than an insincere attempt to flatter them. The ideal compliment is sincere, specific, and something of real interest to the prospect.

The sincerity of the compliment is in direct proportion to how specific it is. To say, for example, "Mr. Smith, you are known as someone who is really an expert in your field," may make him wonder what is referred to and who has been talking. To mention specifically, however, that other store managers consider him to have been highly innovative in carrying new lines may greatly increase the perceived sincerity of the compliment. Remember that the compliment has the most value when it refers to an area in which the prospect has the most interest and pride. A sales representative's use of the compliment approach might be:

> *Ms. Taylor, I see you've redone the decor of the women's department. I think it looks just great. It blends in perfectly with the decor and theme of the rest of your store. Would you like to know what other people in your business have done to double their return from the women's department?*

Compliments should always be sincere. Possible topics for putting together a compliment approach follow:

1. Plaques or other mementos of achievement on the prospect's wall
2. The appearance of the prospect's business—interior or exterior
3. An especially pleasant receptionist
4. The prospect's recent promotion to a position of higher responsibility

5. The prospect's family (e.g., perhaps a child was just named to the all-city basketball team or received an academic scholarship to a college or university)
6. Recent news of business successes by the prospect's company
7. Pictures of the prospect

Regarding the last of these, one salesperson was able to sell a notoriously difficult record-industry executive. The man's office was vast and intimidating, with one wall literally a photo gallery of rock stars and musicians. The sales rep had no idea who the musicians were, but he noticed that the executive was much heavier in the photos. Assuming that all of us worry about our weight, the rep began, "Before we discuss anything else, I have to know how you lost 40 pounds." Within minutes, they were sharing diets and exercise routines.[23]

VIDEO

8-4f The Product Approach

A physical demonstration of the product itself (or some aspect or benefit of the product) can be a dramatic opener. For example, a glue salesperson might say to a prospect, "These two pieces of wood are held together with our glue. Try to pull them apart."

The advantage of the product approach is that it appeals to more than just one of the prospect's senses, and this increases attention. Even with products too large for the sales representative to bring along, it is still possible to hand buyers something to grab their attention. When Charles Ward was vice president of manufacturing for Brown & Bigelow, a calendar printing company, he purchased one of the first rotogravure presses in the United States. Even though such presses had been used in Europe for several years, U.S. customers initially shied away from their use because of the higher cost. Convinced that the press's higher quality would be attractive if given a fair hearing, Ward decided to try selling a rotogravure on his own. Getting the name of an "impossible" account from one of his salespeople, Ward handed the receptionist a painting reproduced by rotogravure and asked her to take it to the president along with this message: "A Mr. Ward wants to talk to you about pictures like this one." The president was impressed enough with the picture to invite Ward in. Ward described the new European process and reminded the president that the calendars his firm sent out were reproduced from original art. "Aren't the high-quality paintings you buy each year worth the best reproduction possible?" he asked. Ward received his order shortly. Similarly, the computer salesperson might give prospects a printout specially designed for their needs. A salesperson for a truck-leasing firm might hand a color photograph to a transportation manager and ask, "How would you like to have your trucks look this good all the time?"

VIDEO

8-4g Getting Agreement on a Problem or Situation

If buyers have no problems, needs, or wants, they probably will not be interested in the salesperson's presentation. Accordingly, the sales representative may begin with a question to confirm the existence of a need that the product or service can resolve. Often the preapproach will reveal clues to a problem, in which case the salesperson can ask a verification question to confirm the accuracy of this information:

> *Mr. Smith, I understand that you just bought out the Acme Company. Doesn't that require an increase in your mill-working capability?*

In the absence of hard facts, the sales representative may inquire about a need that is common to businesses like the prospect's:

> *Ms. Jones, other people in your industry tell me they are finding that their business forms keep increasing in cost. Is that true of your company also?*

8-4h Qualifying the Buyer

Without prior information, the salesperson may want to qualify the prospect first before proceeding further into the interview. There's no point in continuing, after all, if there is no need. A mutual-funds salesperson might open:

> *Mr. Hardy, if I can satisfactorily demonstrate a way of investing your money for both a high yield and security, would an investment of $100 a month be a problem for you at this particular time?*

With the qualifying approach, the salesperson must be careful not to antagonize the prospect. Asking abruptly about need, ability, and authority will alienate even the most even-tempered prospect. So the salesperson should preface the qualifying question with a reason, such as the benefit statement earlier. Another good prefacing statement would be:

> *Mr. Hardy, I wouldn't want to waste a moment of your valuable time, so I wonder if I might ask you a few questions about . . .*

VIDEO

8-4i The Survey Method

The survey method is widely used in large-unit industrial sales. Business machine companies such as IBM, Unisys, and National Cash Register are extensive users of the survey method.

When using the survey method, the sales representative begins by seeking permission to survey, or gather information on some aspect of the prospect's business in which the salesperson may be of service. It is, in effect, a formal method of exposing problems and formulating a solution to these problems. The survey method is attractive to industrial prospects because they realize that their company's problems may be so unique that no sales representative can recommend a solution without extensive study of the firm's system. Yet receiving permission to conduct the survey may involve a considerable effort on the part of the salesperson. In some respects, the survey approach requires two sales: selling the prospect on the idea of a survey and the actual sale itself. Sometimes the former involves more effort, and the order follows as a logical result.

The survey approach offers advantages to both prospect and salesperson. To prospects, it represents an opportunity to have their business studied by experts but with no commitment on their part to buy. From the salesperson's side, the survey represents opportunities to uncover deficiencies within the prospect's operation, match exact solutions with needs, develop cost justifications, further qualify the prospect, meet with top management, and enhance prospect confidence in the salesperson. But the salesperson should not automatically employ the survey with each and every prospect. Because it is so costly and time-consuming of company resources (especially the technical personnel that have to carry out the survey), it should be used only for large accounts with complex operations.

The efficacy of the survey method is based firmly in the principle of reciprocity. That is, we feel obligated to reciprocate when we receive a favor. A customer who feels indebted to a particular company may buy its services to repay the favor of a free examination or survey. The salesperson should be cautioned again, however, that the high cost of the product or service can reduce or negate this tendency.[24]

8-5 The Next Step

Once the approach is completed, salespeople should spend time with prospects, discovering their needs and problems. This is an important stage, perhaps the most critical one in the selling process. Often prospects fail to buy not because they do not understand the product but because they do not understand the need for it. This crucial problem-recognition process is discussed in Chapter 9, "Problem Recognition."

Chapter Summary

The approach represents a critical stage of the selling process because it is the first time prospect and salesperson meet face-to-face. For this reason, many have called the approach the most important 30 seconds in selling. During the course of the approach, the sales representative has to gain entry to the prospect's office, establish rapport with him or her, and gain the prospect's attention for the remainder of the interview.

There are three basic ways of gaining entry: a letter, a cold-call, and a telephone call. Because the sales letter and cold-call were extensively covered in Chapter 7, "Successful Prospecting," most of the discussion in this chapter centered on the use of the telephone in the approach. The basic objective of the telephone call is to sell the interview, not to sell the product or service itself. As such, there are six steps in the telephone track:

1. Precall planning and organization
2. Identifying yourself and your company
3. The lead-in statement
4. An interest-capturing statement
5. Stating the purpose of the call and asking for an appointment
6. Handling any objection

Once the salesperson has gained entry, a major task is to establish rapport with the prospect. The importance of establishing rapport (i.e., dress, eye contact, shaking hands, posture, etc.) with the buyer was emphasized. Other aspects of sales etiquette were discussed, such as how to remember the buyer's name and how to avoid certain mannerisms that may annoy buyers.

The final portion of the chapter concentrated on ways of gaining prospect attention using openers such as the introduction approach, the referral, offering a benefit, appealing to curiosity, the compliment approach, the product approach, problem agreement, and the survey method. Sometimes an approach will consist simply of qualifying the buyer.

Discussion Questions

1. What are the three major ways of gaining entry to the prospect's office? Which is preferable and why?
2. What is the primary objective of the telephone call?
3. What are the six steps in the telephone track?
4. Why is precall planning important? What can be done to improve it?
5. What are some suggestions for improving telephone delivery?
6. What are some effective lead-in statements? Which are best?
7. What are some interest-capturing statements?
8. How far should the sales representative go in stating the purpose of the phone call?
9. What are some common objections heard over the telephone, and how can the salesperson handle them?
10. What are the elements of gaining prospect rapport?
11. What are the elements of making a good impression on the prospect?
12. When should the sales representative shake the prospect's hand?
13. What are some topics for small talk to open the interview? Are there any hazards with small talk?
14. What are some ways of reducing tension at the onset of the interview?
15. What are some suggestions for remembering a prospect's name? Why is it so important to remember?
16. What are some openers to gain the prospect's attention?
17. What is the survey method? When is it used?
18. Describe how the salesperson should respond to voice mail.

19. Lisa Carter, account representative for WOKY television station in Green Bay, Wisconsin, has an appointment with Bob Thomas of the newly opened Carleton Supper Club. The Carleton offers gourmet food along with big-name entertainment. Until now, Bob has restricted his advertising to newspaper and radio. Making use of the following techniques, formulate approaches that would be useful to Lisa:
    a. Introduction approach
    b. Referral approach
    c. Offering a benefit
    d. Curiosity approach
    e. Compliment approach
    f. Product approach
    g. Getting agreement on a problem
    h. Survey method
20. Craig Baker, sales representative for the BMI Company, has identified the Western State Bank as a prospect for BMI's automatic tellers. The president of the bank is Terrence Noone, who is noted in town for his conservative ways. Plan a telephone call for Craig that will secure an appointment with Mr. Noone.

Chapter Quiz

1. The approach is the
    a. first time the salesperson and the prospect come into actual contact with one another.
    b. process of gathering personal information about the prospect.
    c. method the salesperson will use to present the product or service to the prospect.
    d. process of making an appointment to see a prospect.
2. The least valuable means of gaining entry to see a prospect is the
    a. telephone.
    b. cold-call.
    c. mail or email.
    d. in-person visit.
3. The introduction by the salesperson during the identification step of the telephone track contains all of the following elements *except*
    a. prospect's name.
    b. salesperson's name.
    c. gatekeeper's or screener's name.
    d. salesperson's company.
4. Of the following lead-ins, probably the best is
    a. literature sent to the prospect by the salesperson.
    b. third-party references.
    c. a statement of a known problem in the prospect's industry or profession.
    d. the inactive account approach.
5. In the telephone track, once the salesperson has attracted the prospect's attention with a lead-in, the next step is
    a. stating the purpose of the contact and asking for an appointment.
    b. handling any objections.
    c. identification.
    d. an interest-capturing statement.
6. After gaining entry to the prospect's office, the second major task of the approach is
    a. gaining the prospect's attention.
    b. to establish rapport with the prospect.
    c. to state the purpose of the visit.
    d. to present the benefits of the product.
7. Eye contact is an important element of first impressions. All of the following statements about eye contact are true *except*
    a. prolonged eye gaze is perceived as confident and assertive.
    b. correct eye contact projects honesty, sincerity, and attentiveness.
    c. failure to make eye contact may be interpreted as sneaky, dishonest, or insincere.
    d. rapidly moving one's eyes after initial eye contact is perceived as sneaky.
8. In terms of gaining attention, _____ is probably the most widely used type of opening.
    a. offering a benefit
    b. the introduction method
    c. the referral method
    d. the compliment approach

9. "Ms. Taylor, I see you've developed a new point-of-purchase display. I think it looks just great. Would you like to know what other people in your business have done to double their return from their point-of-purchase displays?" This is an example of the _____ approach to gaining attention.
   a. referral
   b. curiosity
   c. product
   d. compliment

10. "Mr. Smith, other people in your type of retail business tell me they are finding that their storage costs keep increasing because of potential food spoilage. Is that true of your company also?" This is an example of the _____ approach to gaining attention.
   a. gaining agreement on an industry problem
   b. survey method
   c. referral method
   d. getting agreement on a problem or situation

Profile

Customer Profiles for Role-Playing Exercise

For the following prospects, prepare a telephone track that will secure you a personal appointment. Additionally, write down approaches you believe will be effective for the beginning of a sales call. You may need to review the product descriptions provided at the end of Chapter 6, "Beginning the Relationship Selling Process." Please note that two names are provided for each buyer, allowing either a male or a female student to play the described buyer role.

Sales Representative's Background Information, Radio Station WEAU

You have identified the Down to Earth Restaurant in Eau Claire, Wisconsin, as a prospect for WEAU radio station. The restaurant has been in business five years and serves unique, good-tasting natural food. Some menu items are of the unusual sort expected in such a restaurant, but many are traditional, including sandwiches, soups, and salads, though these are still made with all-natural ingredients. It is not surprising that Down to Earth's clientele tends to be young and well educated. In fact, most customers are students and faculty from a major, 4-year, urban university only two blocks away. Down to Earth is also within three blocks of the downtown area, where many offices and retail stores are located. Service is limited; patrons must place their own orders and take their trays to their table. Of course, this holds prices down, and younger customers do not seem to mind. Parking is limited, although the restaurant is within easy walking distance for most customers. From your own observations, you know that the owner, Ted (Tina) Leahy, advertises extensively, and exclusively, in newspapers. You also know that several new restaurants have recently opened up in Eau Claire and that they must be having some effect on trade.

Sales Representative's Background Information, Ergo Futura Furniture

You have identified the Hoosier Mutual Insurance Company of Indianapolis, Indiana, as a prime prospect for Ergo Futura desks and chairs. Because of its rapid growth in the area of casualty insurance, primarily home and auto, the Hoosier Company has computerized its applications and claims processing. In addition to the company's large IBM mainframe, one hundred data-entry clerks sit before CRTs inputting data. Through one of your friends, who sells photocopiers, you have learned that Clarice (Clarence) Jansen, controller at Hoosier, has expressed some dissatisfaction with the computerization process. In fact, you understand that they plan to hire 25 more clerks because of unrealized gains in productivity and expected additional business.

Sales Representative's Background Information, the Falcon King Air

You have identified the Baker Paper Company of Portland, Maine, as a prospect for the King Air. From Dun and Bradstreet, you learned that Baker sells half a billion dollars' worth of assorted paper products per year and that it has plants and sales offices nationwide. You recently heard from one of your existing customers, Wally Bergstrom of Bergstrom Paper, that Baker executives might be interested in purchasing their own aircraft, as they now have none. At a trade association meeting of paper executives, Wally was talking with Edgar Smith, president of Baker, about Bergstrom's recently purchased King Air. Mr. Smith agreed that his recent experiences with commercial airlines could certainly cause one to think about buying a corporate aircraft. Your objective for making an appointment with Smith is to convince him to take a demonstration ride in the plane. From Wally, you have learned that each month upper-level Baker executives make 80 trips and middle-level managers make 45 trips.

Sales Representative's Background Information, Pip Pop, the Powdered Carbonated Soft Drink

You have identified Quick-Stop stores of Miami, Florida, as a prospect for Pip Pop. Some 20 stores in number, Quick-Stop caters to adults in a hurry to make limited grocery and drug purchases and young people looking for snacks and entertainment. To appeal to the latter, Quick-Stop features frozen soft-drink machines, a large candy selection, video games, comic books, and the like. Quick-Stop stores are open 24 hours a day, and, as typical of their sort of operation, their prices are higher than full-service supermarkets. Donna Layton is the purchasing agent for the chain, buying for all 20 stores.

Sales Representative's Background Information for Financial Services Project

The Swansons, George and Marilyn, have two children, aged 4 and 12, and they live in Overland Park, Kansas, a suburb of Kansas City. Their home has been valued at $230,000, and they carry a 30-year, 6.5 percent mortgage on it. The following data describe their financial situation:

- A combined income of $100,000 from George's work in personnel for Butler Manufacturing and Marilyn's job as a teacher in the Kansas City, Kansas, school system
- Assets worth $93,000, including bank certificates of deposit totaling some $53,000, miscellaneous items (including art and antiques) worth about $20,000, and $20,000 in individual retirement accounts and a tax-sheltered 401(k) company retirement plan
- Term life insurance of $25,000 on George and $14,000 on Marilyn
- A company retirement benefit currently expected to provide an annuity of $100 per month at age 65
- Their current investment program consists of $4,000 per year for the IRAs and $2,400 a year to the 401(k) plan
- Debt of $750 on revolving charge accounts

Web Exercise

Go to www.entrepreneur.com/business-coaching/articles/0,6897,298630,00.html and select two or three articles to read on sales techniques and approaches. What kinds of techniques will work well for nearly every industry or business? Which areas need more tailored approaches? Which approaches do you feel most comfortable starting with? Why?

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