

# The Power of Pre-Call Planning

By Bill Brooks

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Knowing what you're getting into before you get into it is a valuable piece of advice to take. Over 18 years ago my wife, Nancy, and I relocated. Before deciding where to relocate we conducted extensive research into the community. Maybe you did the same thing.

We looked at schools, tax rates, growth patterns, shopping and recreational activities and much more. We prepared to make our move! I am often struck by the lack of preparation salespeople reflect when making a sales call or presentation...their "move."

Research conducted several years ago revealed that effective Pre-Call Planning was going to prove to be the most critical component for sales success going into the next millennium. And I don't disagree. With the volume of change, reorganization, re-prioritization, consolidation, change of direction, downsizing, outsourcing and data generation in today's marketplace, it is obvious that not only awareness of, but knowledge about all of that any more is essential.

What are the ways that Pre-Call Planning can pay-off for you as a sales professional?

- You will feel more confident in your sales presentation.
- You will come across as more knowledgeable and professional in the eyes of your prospect.
- You will have developed a game plan, or strategy, for the call.
- You will have a greater chance to make the sale.

If these pay-offs aren't enough to convince you that you should spend more time in Pre-Call Planning. How about this one. When is the last time you said the wrong thing and the second you said it, you could see it was 100%, totally the wrong thing to say? Did you wish you knew it was wrong before you said it? Proper Pre-Call Planning could have prevented that embarrassing moment from ever occurring!

How about some of the sources of Pre-Call data gathering that could help you? Where can you get the information that could prove invaluable to you as you prepare for your call?

- Internet/Website
- Salespeople who already sell other products to your prospect.
- Prospect's annual report
- Press releases and articles
- Prior sales records
- Internal advocates

- Trade and professional associations
- Networking sources

Just as important, what are some of the things that you will want and need to know before you ever get face-to-face with a prospect? Here are a dozen. The truth is that there are at least a dozen more.

- What is the formal and informal structure of the organization?
- How do they make decisions with regard to your type of product?
- What is their budget? Schedule for purchase?
- Why do they buy from their current supplier? What do they look for in new ones?
- Who (by name) is the salesperson you will be selling against? Strengths? Weaknesses?
- Does the current vendor have a product, service or delivery glitch you could exploit?
- Who are the key influencers in the account?
- How long have they been looking for a source for your product?
- What are they looking for in a supplier?
- Do they traditionally buy on price? Quality? Service? Delivery?
- What is the likelihood of reorganization within the organization?
- What do they absolutely do not want to change?

All of this valuable information not only tells you the strategy to develop, it also gives you an added sense of unequaled confidence. Perhaps most important, though, it will tell you precisely and accurately which questions to ask - and which ones to avoid - when it comes to helping your prospect verbalize and identify the specific reasons why they will buy.

Proper Pre-Call Planning will reveal to you exactly which questions to ask. And here's the best part - selling anything is a function of intelligent questioning, coupled with an accurate strategy both designed to allow the prospect to reveal exactly what, why, how, and when they will buy.

Perhaps the most valuable components to Pre-Call Planning will help you understand the proper level at which you will enter the court and the key players inside of the account before you ever get there. Here are two valuable tips:

- Enter the account at as high level as you can. Determine where your toughest competition enters the account and enter one level higher. Remember, once you enter too low trying to reposition yourself higher will be very difficult.
- Master an understanding of the four key players you want to target before you enter. Here they are:
  - The Buffer - whose job is to keep you out.
  - The User - The person who will actively be working with your product.
  - The Checkwriter - The final approval.
  - The Internal Advocate - The single person who will help you the most.

Failure to invest time in Pre-Call Planning is like a boxer going into a match with one arm tied behind him or a soldier going into combat with a half-empty rifle. Don't put yourself at a disadvantage. You're a sales pro...act like one!

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