



Do you have a **clear aim** for each **Sales Visit**?

Can you answer these three questions?

1. Should there be a Plan A and Plan B for every sales visit? Why?
2. Many salespeople mistakenly feel that '*Chance and improvisation has more impact on making a sale than careful planning*'. Why is this wrong?
3. What is the correlation between having clear objective for the visit and keeping initiative?



Can you solve the following three problems?

1. Ashok is an experienced salesperson, keen to improve his own selling techniques. A question bothering him for a long time has been: "Why do most customers use price as a weapon?" Recently he got a cryptic answer:- "Because most salespeople do not have an agenda for their meeting with the Customer!"
Ashok first dismissed it as an illogical wisecrack. But it remained in his mind. Suddenly he saw the connection, tried it out and greatly improved his performance!
Can you tell what could be the connection between 'ensuring an agenda' for meeting and 'avoiding acrimonious price discussion'?

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2. You represent a company making Diesel generating sets for factories. The range of your products is quite wide and each has many optional features. You have shortlisted a large Industrial Manufacturing company in your area to prospect on. The company uses your generating sets but has also bought one more brand in the past. Their expansion project is in an early stage and the genset requirement has to be finalized soon. You estimate total requirement to be worth Rs 30 L based on project size and power situation. With good past record, you expect an order for 3 out of 4 generating sets of 160 KVA they may go for.
Your main aim is to ensure such an order of 3 out of 4 sets. Name at least three possible retreat aims and rank them in descending order of preference.
3. For the sale in case no 2 above, four key people involved are as follows:- VP Purchase, Chief Engineer Maintenance, VP Finance, and Senior Plant Operations Manager. You have decided to meet Chief Engineer first, and have got his appointment. Create a mental map of how your meeting should progress. Jot down at least 3 sequential stage goals – the ‘milestones’ - to tick during the 40 minutes meeting, one milestone approximately every 15 minutes.

Stage Goals and Visit Objectives

A Military Example on Stage Goals

Let us take a military situation first. Imagine that you are an army General, and you have camped at a frontline post in a jungle. The headquarters have just told you that you and your platoon of 100 soldiers need to cross a river that lies 20 Km from where you are, and be on the other side by 9 tomorrow morning. Your immediate task to ensure this manoeuvre is to decide how to do it, and also have a fall back plan B. Your likely thought process would be on the following lines, although details could be different.

You will think -

1. My main aim is:- “Whole platoon should reach other side of the river by 9 A.M. tomorrow”
2. To achieve this,
 - a. Engineers must build a bridge on the river by sunset today.
 - b. Entire platoon must be ready before 6 A.M. tomorrow.
 - c. Advance party must cross the bridge by 7 A.M. and report back to me over the radio.
 - d. Rest of the platoon must begin their march not later than 7.30 A.M.
 - e. Equipment (guns etcetera) to be taken over bridge at 8 A.M.
 - f. All back up team must cross by 8.30 A.M.
 - g. Engineers must begin to dismantle bridge as soon as the last soldier has crossed.
3. In case something unavoidable happens,
 - a. At least half the men should have crossed with necessary equipment by 9 A. M.
 - b. At least begin to cross by 9 A.M.
 - c. Advance party should complete the reconnaissance by 9 A. M. for me to talk to HQ.



Seven sequential events under 2 above are called the stage goals. These serve as a checklist to know one's actual progress and compare it with desired or expected stage goals. If there is a variation one can think of change in tactics.

Three successively lower level (yet acceptable) objectives under 3 are called **retreat aims**. Each retreat aim is a well thought out and pre-planned destination – ‘where to land’ in case main aim becomes impossible.

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As markets become more competitive, it is no different than war. Every sales visit must therefore have main aim and at least 3 retreat aims in the order of priority. Some examples of retreat aims in selling are: part order, trial order, approval, generating interest, re-tendering and so on.

One must also decide stage-goals to reach the main aim, i.e. acceptances one must receive from Customer. Some stage goals can help identify retreat aim. But a stage goal itself is not a retreat aim.

This note covers medium size orders requiring 3 to 5 Customer contacts. By contacts we mean face to face visits (most ideal), video meetings (okay if norm in an industry), or phone meetings (not preferred). For the sake of convenience the term used in this note is 'visit'.

Visit Objectives

Visit objectives could be in one of the following four categories:

1. Selling - Your visit objective could be the next stage in DAPA sales process.
2. Negotiating – after achieving the basic buy in; if handling price objection does not succeed.
3. Influencing key person/s, and cultivating the contact.
4. Informing customer on something as value-add.

Serial no 1 i.e. selling objectives will form the bulk of visit objectives for most salespeople. These could be a combination of the following elements of selling.

- Identifying the true need and influencing it to generate a want.
- Acceptance from the Customer (person by person) about the key need/s identified.
- Presentation of our solution –
 - One to one, verbally.
 - To the group, stand up interactive presentation.
 - Documented proposal.
- Handling of non-price objections.
- Handling of price objection.
- Closing.

Fleshing out Objectives – Product Tactics & Contact Tactics

Two tactical areas that would 'flesh out' such objectives are: Product Tactics & Contact Tactics.

Product Tactics

Based on the information you have about Customer you will form Product tactics by answering such strategic questions as:

- *What is the synergy between our company's product strategy and this Customer situation?*
- *Is the Customer well known; so that some products could sell automatically and you could focus on others?*
- *If the Customer is new for us should an attractive product be used to gain entry?*
- *Is he a prestigious Customer with reference value?*
- *Are we selling the exact alternative product or an indirect substitute?*
- *What is the total cost of ownerships for different possible products?*

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Contact Tactics

Contact tactics concerns such questions as:

- *Whom to meet in what sequence?*
- *Who can give us most information?*
- *How high to go in the Customer organization? For short term? For long term?*
- *When to meet? (Office time, Breakfast meeting, Lunch meeting).*
- *Whether to meet them singly or otherwise?*
- *Is a group meeting desirable? Is it feasible?*
- *How to overcome buyer's resistance for meeting with a key person?*
- *Does anyone take a personal risk about performance of our solution if they buy? How can we help him mitigate the risk?*

Benefits of a visit with a Clear Aim

Real life and real time answers to these questions and accordingly rephrasing above list of sales objectives make them sound more real life like.

How does all this help make your visits productive? Once you have a clear aim and well-anticipated stage goals, you can retain control and revise the visit plan on the spot easily no matter how the visit would unfold. That is what helps keeping initiative in sales visit. And mind you, the Customer is not averse to give you the initiative because his true desire is to know how your solution can help him. In the absence of an 'Agenda' (as Ashok's friend told him in problem no 1) the Customer does not know what to discuss and the only thing he can take out like a weapon is price!

Secondly, if one ensures a few retreat aims for each sales visit, one will not panic if the main aim seems out of reach at that time.

You get something out of every sales call, and that makes you more productive.

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