

## Get More Efficient with Estimating 9.10.12

**We have a lot of walk ins, who are potential customers. They are doing their homework on what's available and what things cost. Right now, if they ask for an estimate we say we'll get back to them - then there's a week of delays to get the estimate out, and once they get a price from us, it's an opportunity for them to go to our competitors. I want close more sales on the spot and reduce the chances prospects will make a purchase elsewhere.**

**Thoughts of the Day:** Qualify prospects for needs and timing. Create a system to quote on the spot. Tell prospects what to expect from you next, and build trust by doing exactly that. Ask for commitment before saying good-bye.

Systematize basic sales skills. Create a set of routine questions that every sales person asks right off the bat, in order to get to know what a prospect needs. Build a questionnaire that sales people fill out, that matches how information gets fed into proposals.

Have a spreadsheet that tracks prospects, including introduction, information gathering, proposal submission, follow up and final decision. Note which competitors your sales people run into, and who on your sales team is involved in each sales opportunity. Analyze what's going on. Which competitors to watch out for? Why? Which sales person is doing an excellent job at each sales stage? What can you teach your sales people, so they can replicate best practices?

Upfront, define the scope of prospects' needs. Try explaining it this way. "Some people need very complex solutions, and will pay hundreds of thousands of dollars. Other people want something simple, and have a very limited budget. I don't want to waste your time, or mine. Give me a ballpark that you think you can live within, so I can create options that fit within your budget."

Review the pattern and complexity of your company's sales. Look for the things that come up regularly. Make policies - which kinds of clients get what levels of discounts, and who in the company has to approve them.

Work out standard quote language, with blanks that can be filled in. Build templates on the computer that the sales person can pull up and quickly complete while the customer is still in front of them. If it's necessary to get management approval before extending a quote, make sure there's always a manager on call.

Customers want to have a relationship with the person who is selling to them. That doesn't mean knowing everything about a prospect's family history. It does include

being knowledgeable about the buyer's needs, and invested in helping that buyer to be more successful. Record notes in a database for access throughout the sales process.

Establish business relationships. Tell prospects what to expect. Refer prospects to satisfied customers who can vouch for how the sales person helped them, as well as vouch for the product or service. Make sure prospects know how to reach a sales person. Return all calls by the end of the day, even if it means sending an email or leaving a voicemail.

Seek commitment. It's fair to ask where a prospect is in the decision making cycle, and what would cause them to take action on a proposal. It's also fair to point out that, as a sales person, one gets paid by educating customers and helping them to find the right solution. And that the job isn't complete until the customer has made a purchase with which he/she is satisfied. Ask the prospect what else has to be done to complete the job.

Looking for a good book? How to Get Your Point Across in 30 Seconds or Less, by Milo O. Frank.

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