

FROM A LEAD TO CLOSING A SALE

Sales || Resource Guide

Use this resource guide to help walk you through some of the steps of taking a potential customer from a lead to a sale.

1. Initial Contact

- ▶ Phone call, email, letter, chance meeting
- ▶ Communication is professional, clear and engaging
- ▶ Goal is to schedule a meeting or presentation, send a proposal, or further communication

3. During the Meeting

- ▶ Be attentive and confident
- ▶ Explain your product or service clearly
- ▶ List the customer benefits
- ▶ Ask if there are questions
- ▶ Discuss the price of your product or service
- ▶ Ask again if there are any questions
- ▶ Ask for input (concerns, willingness to purchase, etc)

5. Ask for a Sale

- ▶ Be prepared to negotiate
- ▶ Keep an open mind
- ▶ Look for solutions to any obstacles

2. Prepare Materials for Meeting

- ▶ Develop agenda with timeframe
- ▶ Identify questions that you want to ask
- ▶ Know what you want to accomplish

4. Create Proposal

- ▶ Clearly understand the scope of the work
- ▶ Produce a proposal that is well-organized, clearly written, and concise
- ▶ Build a budget that is realistic and detailed
- ▶ Identify supporting materials to include with the proposal
- ▶ Deliver the proposal on time