

Sales Discovery Visit Checklist (Generic)

Preparation:

Before you visit, **do your homework** to find out as much as you can about your prospect. Visit their website, Facebook page, Instagram, LinkedIn. Research their industry for news and trends

- What are their goals?
- Who are their customers?
- Who are their suppliers?
- What are their products / services and how do they procure them?
- Who are their competitors?

If you don't know how to do this, we can train you and your staff

The Visit

Once you visit. Let them know how you found them and what impresses you about their business. (e.g. I saw your booth at a trade show, your website, your storefront).

Introduce yourself and your relation to their business and customers (e.g. "I work in the UPS store in our neighbourhood." "I like to welcome and get to know new business in our area.").

1. State their goals.

"Am I right that you want your business to be...." Or "I read on your web site that you want to..."

2. Elaborate on their challenges.

"Managing your shipping costs and cash flow can be a challenge. Do you find that is the case?" "How are you doing attracting customers to your location?" Don't use something generic that shows you have not done your homework like "What is your biggest challenge?"

3. Ask them what it means.

"How is that impacting your business?"

4. Paint a picture of a better tomorrow.

"What if you could.....?" (e.g. decrease shipping costs, ensure better delivery, get more people in your store) "What if we could help improve (your store traffic, your bottom line, availability of product)?"

5. Prove you have done it before.

"Did you know that we have been able to ("increase traffic, reduce shipping costs", whatever the benefit of your solution is)?"

Leave all your sales materials (price list, samples, etc.) in your vehicle. Wait for your conversation to focus on something you can help them with, then go to your car to retrieve the appropriate material.