Put Your Words to Work: A Selling Scripting Model – Part IV

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Author: Carolyn Merriman, President

In previous 3 parts to this series, we've given you tips to become a better listener, to ask better questions and to implement a strategy that ties everything together. (The links to these parts are found at the end of this article.) In this section, we show it all in the context of a sample sales call, featuring scripted scenarios you can tailor for your use. Keep in mind that this is only a portion of the big picture you'll encounter as a salesperson. But learning to get to the heart of what your customer needs through listening and questioning is a crucial step in presenting an effective solution. Our sample scripts are intended to give you a way to jump–start your own sales skills. It's your job to customize them to reflect your own style, based on your own customer and scenario.

The Situation

Let's say there's a new distribution plant opening in the industrial park in town. The hospital has several clients in this industrial park and wants to establish a relationship with the new prospect and ultimately gain its business.

The salesperson, Susan, has talked with the plant manager. He has indicated that the vice president of operations is the person in charge of healthcare and employee issues. Other staff members support human resources, safety and finance decisions. Susan wants to conduct an information–gathering appointment with the VP and seek approval for meetings with the rest of his team.

Start at the Top
Sell from the top down. Start with the highest person in the company and let her tell you that you should talk with her next-in-command. It's a lot easier than approaching a person who doesn't have the knowledge or authority to make a decision.

The Script – Using the CERT Model

The CERT model, created by Corporate Health Group, is a four-step, needs analysis tool to help you manage your ongoing dialogue with your customer. Through CERT, you can get a better understanding of the who, what, where, when, why and how behind your customer's purchasing decisions.

Step 1: C = Confirmation Questions
First, confirm a sales opportunity by gathering history or background information from your customer. Now's the time to get new data and assure that the data you may already have is correct and current. If not, get the facts before moving on.

"It's my understanding from talking with your plant manager that your new operation will be opening in January 2001. Is this correct? Can you share with me some of the company's objectives in opening another distribution plant?" (Here, you're looking for what the customer might say about increase in revenues, being able to handle customer demand, seeking global market contracts, seeing another plant being phased out due to its age, etc.)

"Based on your objectives, it appears you will be adding employees and shift to accommodate these issues. How many employees are you moving over to this location and how many will be new hires? Who will manage this process for you? Are you aware of any compliance issues that will need to be managed for this batch of new hires? If so, I'd like your permission to work with your contact on these issues and see how we might be of service."

Step 2: E = Expansion Questions
Assess where your customer would like to be. Aim to get responses that give you details about her expectations, as well as desired or required results.

What are your customer's desired solution and results?

"You indicated that you wanted to have a healthcare provider that works with you proactively rather than just taking care of your injuries. Can you describe what that looks like? What kind of services would you like and how frequently would you want us to work for you onsite here at the new plant? If so, for what group of employees? – and is there space here for that kind of program?"

Ask the customer to elaborate on existing information.

"I understand you have implemented some new group health programs and we are a provider on the panel. The plant appears to have embraced a prevention and wellness philosophy. Would you talk about that a little? How would you like to see this philosophy translated into other programs and services?"

Make sure you understand the customer's priorities.

"We've had a great discussion today and you've presented a lot of ideas for us to respond to. If we had to recap and prioritize, what would you say are the top three needs – and what outcomes or measurements are most important for you to see demonstrated in these programs?"

Step 3: R = Research Questions
Now it's time to focus on your customer's buying motives, roles, politics and dollars. In this step, you can gain information on how the buying decision is made and by whom. You'll also help the customer get a clear picture of what buying from you can do for him.

Explore your customer's buying motives.

What is he hoping to accomplish by implementing this program? How will he measure its success? Help your customer see the “What's In It For Me?” Benefits. Why is success important to her personally? Is she positioning herself for a promotion? Is she looking for the approval and respect of her colleagues?

Make sure the appropriate team is involved in the process.

"Earlier in our conversation, you indicated there's a team of people involved in this decision. Is this still the case? If so, who is on the team and how does the team work? What's the team's responsibility in the decision – are they voting on or choosing the solution, or are they helping to research a solution?"

"When I first visited the plant, I met with your vice president of operations. Since then, I've been working with you on the healthcare proposal. Do we need to present the proposal to him? And, if so, do we need to do this for approval or just as a courtesy? How can I help you with this process?"

Ask about timetables and budget.

"When do you start your budget process? The reason I ask is so that for next year's cycle, I might be able to prepare internal information that you could use."

"What is your budget year/cycle?"

"Last time we met, you indicated that you and your boss were working on the budget for programs like this. Can you help me out with a rough outline of your budget? Would it be helpful if I presented some sample program budgets to be used early on in your budgeting process? How would it be most helpful to break it out – for group, work health, injuries versus intervention/prevention?"

Find out more about how the buying decision is made, and by whom.

"We've been working together for a couple of sessions on your healthcare priorities. Should we be putting together a presentation for others in order to seek consensus or approval?"

"Once the decision is made, what's the best way to begin implementation for your program? Should we tentatively plan on working with your staff – or is there a team we would be working with to begin plant orientation sessions?"

Step 4: T = Fit to a "T" Agreement Questions

Now, you recap the information you've gained during the call and propose an action plan. Don't rush it – recap what you've learned and confirm that it's correct. This is your time to reiterate information as well as re-confirm it. It's also the time to recognize the signs that your customer is engaged and ready for a solution.

There are several ways to build your close – asking for agreement about what you've learned or taking it to the next step. Remember, there's no right or wrong here. You've got to make your close work with your own instincts, style and your customer's comfort zone.

"Based on the information you provided to me, it would appear that these three issues are most critical to the success of meeting your plant's objectives. You've indicated that it's ok for me to meet with your staff for more detailed information on your healthcare programs. I'll set up those meetings before I leave today. I'd like to then take all the information I gather and work with our team at the hospital to build a proposal on how we might best work with your organization."

"Other clients who have similar issues as you do have implemented our programs and successfully achieved an average minimum of ten percent in cost savings. We'd like the opportunity to do the same for you. With that proposal, I'd like to come back in two weeks to present it to you and discuss the options we think can best be implemented for your plant. Can we go ahead and set up the presentation meeting? If so, is there anyone else who should be at that meeting – maybe your staff that I'm meeting with next?"

Close your sales call with a thank you for the business and a confirmation of the next steps you'll take. Maybe it's a follow-up phone call, a written proposal or a meeting between your staff and your client's staff.

"Thank you for taking time to meet with me today. It was really beneficial for me to better understand your goals. I'll work with your staff next and am looking forward to our meeting on Thursday, the 14^{th}. I'll call your secretary the day before to confirm the meeting and the participants, so we'll have presentation copies for everyone. Please don't hesitate to contact me if you think of anything else that would be helpful – your secretary has my number, as well. Thanks again!"

Spread the Word – and Energize Your Team!

Now that you've got some tools to use on your next sales call, consider sharing your newfound information with your sales colleagues. Whether done one-on-one or in a group setting, sales training is more important than ever.

Training is only effective, though, if it's tailored to your organization's target customer, products and services, as well as its staff skill and competency level. Working with a team of trainers can help you introduce scripting, sales techniques and personality style management – all critical factors in the selling process.

Above all, remember the value in sharing these techniques with everyone on your staff – not only Sales. There's incredible value in recognizing the importance of effective customer interaction. Salespeople may bring the customer in the door, but it takes everyone's effort to keep and grow the customer relationship.

(Part 1 explains how to listen and respond to your buyer's unique challenges, as well as identify and sell solutions that work.

Part 2 this series of articles explains how to listen and respond to your buyer's unique challenges, as well as identify and sell solutions that work.

Part 3 addresses some hands-on ways for putting your newly-honed questioning techniques to the test. Learn the types of questions to ask to get good answers, view sample scripts of questioning situations, and learn a strategy to put it all together.)

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Carolyn Merriman, FRSA, President, Corporate Health Group,
www.corporatehealthgroup.com, 1-888-334-2500