



Improving Profitability through Joint Sales Calls

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Sales Calls drive Profitability

- The right customers
- The right people
- The right part of the sales process
- The upsell
- The companion sell
- The cross-sell

- How many of these does your team do—consistently?

- How do you know?



The Really Hard Part

- During the call...
- Be quiet
- Take lots of notes
- Be specific
- Be quiet



Joint Call Checklist

- 1) Number of calls with a sales purpose planned (5 points maximum) Grade: _____
- 2) 1st/last call schedule (5 points maximum) points) Grade: _____
- 3) Call plans (10 points maximum) Grade: _____
- 4) Call schedule quality (10 points maximum) Grade: _____
- 5) Personal (3 points maximum per category)
Appearance _____
Calendar _____
Note-taking ability _____
Literature/samples _____



More Joint Call Checklist

- 6) Profiles (3 points maximum per category)
Exist _____
Substantially complete for major customers _____
Use to prepare for call _____
Updated (as appropriate) after each call _____
- 7) Account Penetration (4 points maximum per category)
Multiple contacts _____
Strategic contacts _____
- 8) Sales Calls (3 points maximum per category)
Punctual _____
Followed call plan _____
Accomplished objectives _____
Scheduled Next Step _____



Even More Checklist

- 9) Mechanics (3 points maximum per category)
Opening _____
Presentation _____
Questioning _____
Listening _____
Overcoming objections _____
Closing _____
- 10) Other (8 points maximum) _____

Total Points: _____



The Debrief

- After each call, ask them what went right or wrong. Write it down. Keep quiet.
- Make your presentation at the end
- Start with the positive
- Limit your critique to three things...have examples
- Agree on an action plan



Really use the information

- Give them a copy
- Keep a copy
- Review the information prior to the next interaction
- Use it to develop the overall training plan for your team
- Use it for formal annual reviews

