



Track: Customer Relationship Development

Unit 12: Putting It All Together: Creating Your Pre-Call Plan

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20 Questions About the ENERGY Selling Process

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LEARNING OBJECTIVES

By the conclusion of this session, participants will be able to:

- Create an effective pre-call plan for an upcoming business development interaction
- Demonstrate the steps in the 'ENERGY' sales process



Evaluating A Pre-Call Plan

Capture your ideas about the characteristics of a really well done pre-call plan below.

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PRE-CALL PLAN

Customer's Name			
Customer's Position			
Company Name			
Completed By		Date	

PRE-CALL

Anticipated Customer Challenges:	
Your Vision - Potential Product(s) to Position:	
Commitment Objective:	
Other Goals and Objectives:	
Anticipated Objections and Plan to Handle Them:	
Known Competitors and Strategies to Compete:	

BEHAVIORAL STYLE

<input type="checkbox"/> Dominance	Results focused; limit socializing; anticipate what questions; emphasize efficiency, savings and profits; show your desire to help them achieve results; provide options; use a direct close
<input type="checkbox"/> Influence	People focused; be casual and friendly; anticipate who questions; emphasize how they will save effort and look good to others; respond to feelings with empathy and use testimonials of others' success; provide ideas for implementing action; use an assumed close
<input type="checkbox"/> Steadiness	Focus on cooperation and stability; be informal, low pressure; anticipate how questions; emphasize how they will be able to maintain a predictable and harmonious environment; offer ongoing support and acknowledge feelings; seek a firm commitment without pushing
<input type="checkbox"/> Conscientiousness	Focus on accuracy and quality; get to business swiftly; let them be the expert; anticipate why questions; emphasize accuracy, logic and quality of solution; reinforce logic, and provide evidence to reassure; clarify priorities and use direct close after time for consideration

PRE-CALL PLAN

INTRODUCING THE LDC

Plan What to Say to Introduce Yourself and the LDC

CUSTOMER INTELLIGENCE

Think about the following topic areas for questions:

- Questions about the person
- *Questions about the business*
- *Questions about industry trends/insights*
- Questions about goals and objectives
- Questions about what's changing
- Questions about problems and challenges
- Questions about needs (the products and services you want to position)

PRE-CALL PLAN

COMPETITIVE INTELLIGENCE

Think about the following topic areas for questions:

- Questions about other forms of energy
- Questions about likes and dislikes
- Questions about experience with natural gas and with your LDC

BUDGET

Think about the following topic areas for questions:

- Questions about what they have spent in the past
- Questions about their current budget
- Questions about the expected return on investment
- Questions about the cost of doing nothing

DECISION MAKING PROCESS

Think about the following topic areas for questions:

- Questions about who is involved with making the decision
- Questions about who has ultimate authority for the decision
- Questions about the decision making process

PRE-CALL PLAN

TIME FRAME

Think about the following topic areas for questions:

- Questions about the timeline for a decision
- Questions about the timeline for implementation

Gaining Confirmation on Needs

As I understand it, you are looking for . . .

SELL THE SOLUTION

Restate the Need:	
Feature/Product:	
Benefit:	
Question:	

Restate the Need:	
Feature/Product:	
Benefit:	
Question:	

Restate the Need:	
Feature/Product:	
Benefit:	
Question:	

PRE-CALL PLAN

OBTAINING A COMMITMENT

Restate the problem the customer is trying to solve.	
Summarize the solution.	
Quote the price.	
Ask a tentative question like “how does this sound” to determine if the customer is ready to commit.	
If the response is positive, ask “Would you like to go ahead with this...?”	
If you get a negative response, then ask questions to uncover the potential objection or stall, and then deal with it.	

PRE-CALL PLAN

MEASURE YOUR EFFECTIVENESS

1. Did you anticipate the customer's challenges?	
2. Did you have engaging questions mapped out?	
3. Did you anticipate objections and prepare appropriately for them?	
4. Was your commitment objective appropriate?	
5. Did you reach your commitment objective? If so, why? If not, why not?	
6. What did you do well in the interaction that resulted in success?	
7. What could you have done better?	
8. What new customer intelligence did you gather?	
9. What new competitive intelligence did you gather?	
10. How did you demonstrate credibility?	
11. What impact did your interaction have on the customer's perception of your trustworthiness and the LDC's relationship with the customer?	

THE 'ENERGY' SELLING PROCESS

E Establish Your Plans

- Set a commitment objective
- Establish a sales cycle plan
- Create a pre-call plan



N Nail Your Approach

- Make small talk to build rapport and create a positive first impression
- Read and adapt to the customer's behavioral style
- Introduce yourself and your LDC in terms of outcomes that your products and services create for customers

E Engage the Prospect in Meaningful Dialogue with Thoughtful Questions

- Ask open-ended questions to learn about the customer's business and industry, your competition, budget, decision making process and timeframe
- Listen actively and restate the prospect's needs to gain confirmation

R Roll Out Your Solution

- Identify the problems that you can solve or goals that you can impact by leveraging the products/services of the LDC
- State the worth of the solution in both quantitative and qualitative terms
- Share a compelling value proposition via an RFBQ
- Ask for feedback from the prospect about the value of the solution

G Gain a Commitment

- Ask the prospect for the predetermined commitment objective
- Recognize and deal with stalls and objections

Y Yearn to Learn from Your Experience

- Replay the interaction and identify what went well and not so well
- Share feedback with the team about each participant's performance



HOMEWORK

- Skill practice the pre-call plan you just created with a colleague at your LDC, and then execute the plan with your prospective customer.