VII. Initial Contact

a) The First Impression

After all that hard work cold calling to get an appointment with your prospect, you want to make sure that you make the best first impression when you meet with him. So now it’s time to discuss your initial contact, which involves your approach and your attitude.

It’s seems kind of funny to have to remind people to dress well when meeting with a client, but I have to say that I’ve seen some pretty strange habits in my years. You can’t take anything for granted. I once went with a reseller of ours to a prospect he was working with. He was going to pick up an order and I was going with him as a courtesy to visit what was to become a new client of ours. Since we worked through a dealership, or reseller, channel, our role as the manufacturer was to support them in these efforts. I showed up in a suit and he showed up in shorts, sandals and a Hawaiian shirt. Somehow, miraculously, he still got the order. But I can assure you that their relationship didn’t last over the long haul. As I said, I learned not to take anything for granted.

Always assume that you have to look professional on every single sales call. This includes not only your clothing, but the amount of jewelry (and where it’s attached, like your nose), your hair length and condition, the shape of your car (does it look like a garbage heap inside), cleanliness of fingernails, the amount of perfume or cologne (do you smell like a call girl), and more.

If your clothes are wrinkled or dirty, or you look disheveled, you will look unprofessional and the prospect will be turned off. If you need a haircut, or your hair is too long or dirty, they will notice. If you have excessive jewelry or even facial piercings with jewelry in your nose, lips or eyebrows, they will notice and think this may reflect on your professionalism. If your car is a mess, inside or out, they will notice. Even dirty fingernails reflect on your overall professionalism. I am not passing judgment on anyone's life style, what they wear, or how they look. If you want jewelry hanging from every orifice on your body, I really don't care. If you like long hair or a certain style of wardrobe, it doesn't bother me.

What I am saying is that these things can easily bother, even insult, your prospect. Your visit with him is not a good time to make a statement. Right or wrong, customers will judge you by your appearance. If it's not good, you may not get any further. If he can't get past you, then your company, product, or pricing won't matter. Show that you care so the customer knows that you respect him and you'll make an excellent first impression.

As far as what to wear, a good rule of thumb is to dress one step above your customer. If they wear business casual, you should wear a business suit or at least a sports jacket or blazer (a tie is optional for men). If they wear work clothes, such as in a plant or in the field, then you should wear business attire (khaki slacks or skirt and a button-down shirt or colored polo shirt). Unless you already know the client very well and they are already your customer and they ask you to dress casual, always dress up at least one level.

When you first meet with your prospect, and at all subsequent meetings, be sure to establish a rapport to warm up the meeting.

Many people like a certain amount of small talk since it helps them to get comfortable with you. However, some people would rather get right down to business and skip the small talk. So be sensitive to how he reacts when you first meet and adjust your dialogue accordingly.

When establishing rapport, simply pick out things to genuinely compliment. But don't be phony. You might notice that they just refurbished their offices or moved to a new location. Make note of it. By researching the company in advance, as I discussed earlier, you can have this knowledge ready to use. Say something like, "*I like your new offices. How did everyone take to the move?*" I once smelled new paint when a prospect was walking me to his office and I said, "*Are you folks sprucing up the place? It already looks pretty darn good to me.*" The prospect proceeded to tell me that they just added a new wing (which I already knew through doing research) and I smelled the new paint from that project. He then proceeded to tell me all about their new growth plans, how many people they were hiring, what challenges that will bring them, and how our product might be able to make them succeed with these new plans. All this because my nose worked well that day.

Something else you could do is to see if you have common interests to discuss. Perhaps your prospect has pictures or awards in his office that you can relate to. Also, always use his name in conversation. People respond very positively when they hear their own name. Plus it shows respect. And don't forget to hand him your business card in the beginning of the meeting. Why? One, it's a courtesy. Two, he may have lost or misplaced the one you gave him last time. Three, he may forget your name or company and this gives him an easy way to prevent embarrassment. If you don't believe me, then watch the face of the next new client you meet with and see how many times he glances down at your business card.

Finally, make sure your body language reflects a positive attitude. Sit up straight. Lean forward and toward the prospect. Be attentive. If you slouch or look disinterested, then you probably are and the prospect will notice.

Your attitude during your meeting should always be positive. If you are having a bad day or you hit a lot of traffic or are having problems at home, the prospect doesn't care. So don't let him see that on your face or in the tone of your voice. Always keep a smile on your face. Don't walk in complaining about the weather or traffic, unless there is some humor associated with the obvious. For instance, it can't hurt to break the ice on a very rainy day by saying something like, "*I would have been here earlier, but I lost an oar and had to paddle by hand*."

When speaking about a competitor, a previous company you or your prospect worked for, an old boss, or anyone for that matter, never speak negatively about them. First, it's better to take the high road and put a positive spin on an otherwise negative situation. Second, you never know how the prospect really feels about the other person or company and you could insult him. You never want to get caught making fun of your customer's brother-in-law (Figure VII-1).

In summary, when meeting with your prospects, and customers, simply show respect. Treat them as you would like to be treated yourself. This will build trust and respect, which is required during the entire sales process. If you don't get trust early on, then the road ahead will be that much more difficult for you.

Figure VII-1 – You never know whose brother-in-law this is

If you don't think your attitude is very important, then consider this. Based on sociologist Albert Mehrabian's research on communication, among the things people pay attention to when you speak, the words you use amount to only seven percent. In other words, people pay attention to the words you use only seven percent of the time. The tone of voice you use amounts to 38 percent and your non-verbal cues, such as your body language, amount to a whopping 55 percent. Hence, 93 percent of what people pay attention to when you speak has to do with your attitude, not the words you choose.

When it comes right down to it, people don't care how much you know until they know how much you care. So show respect, have a positive attitude, and show you genuinely care about your client and their problems. Once they believe that you care about them, they will be more inclined to listen to you when it's your turn to speak. You'll see the value of this when I discuss the skill of asking the right questions and listening in a later chapter.

Here's a story I'd like to share with you that shows the power of positive versus negative thinking. It is a true story and I hope it convinces you that we are what we think.

Years ago, before the Soviet Union was separated into individual states, there was a mechanic working inside a railroad refrigerator car doing some repairs. Without warning, the door suddenly slammed shut with the mechanic inside. The only way to open the door was from the outside. So the mechanic began banging on the door for help. Unfortunately, it was late in the workday and nearly everyone was gone for the day, so no one heard him. After what seemed like an eternity banging and yelling for help, the mechanic resolved himself to the fact that he would be spending the night in that railroad refrigerator car.

The next day when the other workers returned to the work site, sadly they opened the refrigerator car door only to find their colleague dead on the floor. They noticed writing on the wall – writing from their deceased co-worker. There were 4 lines written. They read:

- *It's starting to get very cold*
- *It's getting difficult to breath*
- *I realize that I am going to die in here*
- *These will be my last words*

These words, and the resulting death of their friend, perplexed the workers. You see, due to an electrical problem in the cooling system, the refrigeration unit was not operational and the temperature inside the car that night never went low enough to even remotely approach freezing. So he couldn't have been frozen to death. Also, the car was not airtight and there was plenty of oxygen inside the car. So he couldn't have suffocated. Therefore, their only conclusion was that their poor colleague actually willed himself to death.

Positive thinking yields positive results. Negative thinking yields negative results. Don't get caught thinking negatively. The results are almost always predictable and often devastating.

b) Research from the Cold Call

In order to be prepared for your initial contact or meeting, you can't "wing it". Even the most experienced sales professionals do not rely solely on their instincts during a sales call. The research I discussed earlier will help you prepare a solid foundation for the visit with your prospect.

A good way to impress your prospect, and to gain his respect, is to show him that you are prepared and have knowledge about his business and industry. During your initial cold call, you could have asked the prospect to tell you more about his business. But first make sure he knows that you are aware of the basics since you already should have done some preliminary research, as I discussed in the previous chapter.

Prior to the actual appointment, however, you will want to do more extensive research to learn as much as you can about the business you are visiting. If you read some of their press releases, you can make statements during the appointment such as, "*I understand that your company is expanding into telecommunications. Can you tell me more about that?*" This will show your prospect that you've researched his company and are truly interested in him. What a great way to build trust and respect.

Using the information you already researched, you can ask a variety of intelligent questions to learn more about his business, and ultimately his problems and needs. One thing you can't easily get a handle on, however, is his level of satisfaction, or dissatisfaction, with his current systems, products, purchasing procedures, vendors, or other procedural issues.

Hence, you can ask questions such as, "*What sort of problems are you currently experiencing with your existing suppliers (or products/services)?*" Or, "*Can you tell me what you like and dislike about your existing system?*" These questions will open up the door for an informative discussion about your prospect's current needs and requirements, which you can then use to find the right solution for him; as long as you listen carefully to what he says (Listening skills are discussed later).

One of the suggestions I mentioned earlier about research and being prepared was to know whom you are speaking with. This goes beyond just knowing their name and title in the organization. It means using that information you researched to formulate your questions and delivery of information. For instance, a lower-level, or first-line, manager will be interested in more details such as installation options. Middle managers will want to know about cost-effectiveness, while the CEO will be more interested in long-term goals, profits, and ROI.

Researching information prior to, and based on, your cold call will help prepare you for your initial meetings with your prospect.

c) Organization

Whether you are cold calling or making your first contact in person, the key is to be prepared. This is critical for the first step of the PEAK Sales Process since it sets the stage for the next steps in the process. Your preparation will be evident by how well organized you are. Researching information about the client and using that to formulate intelligent and insightful questions about the prospect will demonstrate your interest in him, your organizational skills, and your professionalism.

In the last chapter, I discussed the many things you can do to improve your cold calling techniques, before you even pick up the phone. This is all part of being organized and prepared. In addition to the recommendations I made about preparation and research, it also helps to profile your prospects before calling. This will actually help develop your list of who to call in the first place, not to mention give you a better understanding of their business since they should be similar to those customers who already purchased from you.

Know who already buys your product, when they buy it, how they buy it, and anything else that will help you understand your customer's purchasing habits. Are they affluent females between the ages of 35 and 49? Are they businesses with less than 100 employees and located in one facility? Are they departments within businesses who can't readily get the services they need from their corporate offices? Once you know this, you can rank your call list and call the "A" players first -- those who best match your profiles. This is a great way to organize your calls into prioritized lists.

Another way to demonstrate your organizational skills, and therefore improve the relationship you want to build with your prospect, is to make sure you always follow up. If the prospect says he is too busy to speak with you now but Thursday works better for him, then you should make sure you call him on Thursday. If he asks you to send him information after your meeting and to call him back in a week when he's had a chance to review it, make sure you send it to him immediately and call him back in a week. Never drop the ball, else it will reflect on your thoroughness and professionalism. If you can't do a simple thing like call someone back when you say you will, then how can he expect you to be reliable when you sell him your product?

CRM technology will help keep track of this information and keep you organized. It will also help you to organize your call list, schedule your follow-ups, and manage your day. You will find that you will be more efficient, effective and successful.

By using CRM technology, such as GoldMine, to organize and manage your activities with a prospect, you can see how easy it can be to keep track of what has been done and what is pending, or yet to be done (Figures VII-2 and VII-3).

Once you do your research, prepare for your first visit, and get organized, you must then make sure you understand the reason for your visit (the same with when you make your cold call).

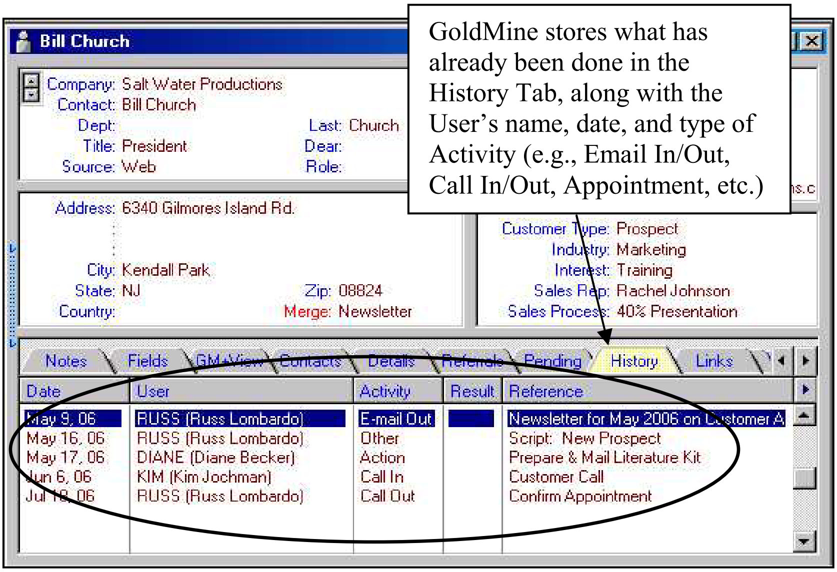

Figure VII-2 –Getting Organized with GoldMine

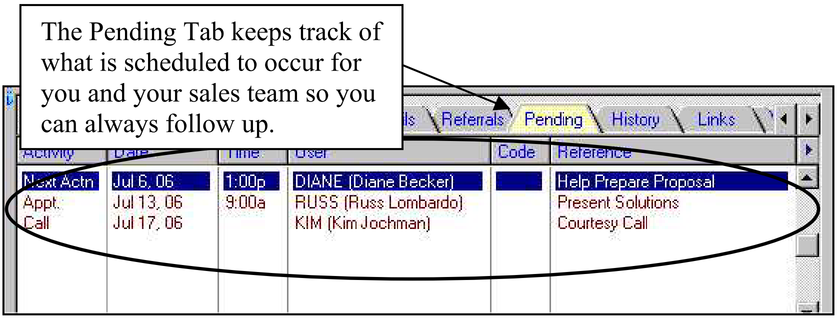

Figure VII-3 –Getting Organized with GoldMine

Every sales call must have a reason. Is it to make an introduction? Will you give a presentation? Are you following up on a previous call to try to close the deal? This gives you focus and will allow you to target your activities more precisely.

Each call and visit should contribute to moving the sale closer to the final objective of closing the opportunity. Remember how the PEAK Sales Process defines a step-by-step approach to moving from the Prospect stage, which I discussed in the first section of the book, to the Engage, Acquire and Keep stages. Everything you do with your prospect should help you move him to the next step of the process, or eliminate him as a qualified prospective buyer.

The same way you must know the reason for your sales call, you must also know what the objective will be – what do you hope the results of the meeting will be. Are you planning on closing the sale at the appointment? Are you looking for more information or to meet other decision makers? Are you hoping to get invited back to do a demonstration? Whatever the objective is, know what you want before entering the meeting. This is a crucial part of your strategy.

I had a sales person working for me once who's objective for an important prospect meeting was to finalize a deal. After a long, challenging meeting, he was so excited that the prospect liked his presentation that he got all wound up in the thrill of the moment and forgot to take the order. We certainly had an interesting discussion when he returned to the office. So make sure you have an objective and achieve it as best you can.
What if you can't? Then have a fall back position. For instance, if your goal is to get the order but some objections were raised that you need to research and get back to the prospect, then your

new objective will be to schedule another meeting to present your findings and take the order then. Or, what if you discovered at the last minute that there is, in fact, another decision maker that the prospect “neglected” to tell you about? Then your new objective for that meeting will be to meet the other decision maker. Simply change the objective based on each situation if necessary.

A good trait of successful sales professionals is thinking on your feet. Meetings don’t always go as expected. When the rules change or the prospect moves the goal posts, don’t panic. Just re-adjust your objectives, take the next step, and try for the close later. Learn to think on your feet and be flexible.

I can assure you that if you don’t organize your activities, you will forget to follow up or drop the ball somewhere along the line. We are all too busy to try to keep track of everything we need to do each day. Therefore, use CRM technology to help you stay on top of all the things you need to do. Let technology handle these little, yet important, details while you focus more on the effort of selling. It will help organize your life so that you’ll have less stress and more success.