the global salesman

Early preparation key to success in team sales effort

How can you maintain control of a team sales meeting and ensure that it progresses to the desired outcome?

Often a sales call in a global setting is done by a team of people. The team may consist of the salesperson in charge of the account, a technical person, a finance person, and a sales manager. There might be a salesperson, a distributor salesperson or agent, and a manager from the home office, or any other combination.

It is possible that the team meets formally for only a brief period immediately before making the sales call. Perhaps the team members are from different geographic areas.

It is easy for the client or potential client to take control of the meeting and use it to his advantage. As salespeople we want to keep control and not give away too much free consulting. We want to make a sale, not give the client more ammunition to be able to shop around with a greater level of knowledge than he had before.

As with any sales call, the first step is to plan in advance. Decide what you want to accomplish and what strategy you will use. You also have to inform the client, as well as your team, what the objectives are.

In a previous WorldCity column (Feb. 5, 2002) I discussed how to prepare for a long-distance sales call. Briefly, you have to enter an agreement with your client. In the case of a team call you also need agreement among the team members. The agreement with the client and the team includes:

- Set an agenda for the meeting.
- What will you and your team members need to do? Obviously, you will need to ask questions, but it is best to advise what types of questions you plan to ask (budget, decision process, problems, etc.). You may also need a room to work in, or access to data or decision makers. Stipulate what the role of you and your team will be.
- What does your client have to do to prepare for the meeting, and what is his role during the meeting? Perhaps they have to set up site visits and arrange for transportation, or have certain materials ready for testing or inspection. Of course, give them permission to ask questions. Every question they may ask is an indication of a possible problem they have.
- Set the desired outcome of the meeting.
- Put objections that you foresee on the table early so they can be overcome (or not overcome) before you get too far into the sales process.
- Verbalize any fears you may have. Do not give the client an opportunity to play games with you.

Include your team members in developing this pre-meeting agreement. Make sure that you establish yourself as team leader, or make certain that the team leader knows what is involved in that role.

A major problem with team selling is that the client can get the team members playing against one another. One team member can say something detrimental to the overall strategy of the team leader.

There are a number of important steps that can be taken to minimize these negative possibilities.

First, have a physical meeting of all the team members prior to the sales call. If an outside member, such as a distributor salesperson or agent, will take part in the meeting, have an insider meeting first. You may need to have a strategy session during the meeting to decide how to deal with the outside member.

Only after the strategy is developed include the outside member. This may turn out to be a sales negotiation before the real negotiation begins with the end user.

Next, assign the roles of the team members. One member should be the team leader and should be responsible for following the sales strategy. If possible, appoint one person as the silent member. This member can keep notes and remain non-emotional in the sales process. He can be the referee in case other team members go off course in the heat of the negotiation.

Stress that no one should answer questions without the permission of the team leader. The team leader must be well-schooled in questioning techniques, especially reversing.

The team leader should take over early in the process. At the beginning of the meeting, after the niceties required by custom and the relationship with the customer, the team leader should review the agenda, roles and desired outcome of the meeting. This establishes the team leader as spokesman for the group at the start of the meeting.

At the end of the team sales call the leader should review any actions that need to be taken by team members. This is to ensure that each team member has taken ownership of her responsibilities as a follow-up to the meeting. After the meeting, an action plan can be drawn up and discussed to ensure understanding and compliance by all team members.

If decisions have been made during the sales visit, these should also be reviewed. It is easy for team members to forget decisions that have been made during a meeting. Also, these should be reviewed with the client to reinforce decisions that he has made or agreed to. This step will help avoid misinterpretations after the meeting.

Follow up on the meeting with a letter or e-mail from the team leader. This letter should thank the prospect for inviting the team in, and should summarize the actions that need to be taken by both parties and the decisions that were made during the meeting.