

# The Sales Meeting

1. **Open conversation and establish trust.** Close on the purpose of the meeting. Example: “What I would like to do today is . . . is that OK?”
2. **Get facts and feelings then find the problems.**
3. **Close on the problem and get confirmation that the client is open to seeing a solution.** Example: “If I could show you a way to . . . , would you like to see how that works?”
4. **Present a solution.** Focus on the benefits the client would experience – not just the features of the product. Example: “This product has waiver of premium if you are on claim. The benefit is that you do not have to pay premiums when you can least afford it”
5. **Close on the solution**
  - a. Client’s Understanding Close: Example: “Do you see how . . . would [solve the problem]?”
  - b. 3<sup>rd</sup> Party Close: Example: “Do you see why many people are . . . [buying this product or service] in order to . . .[solve the problem] ?
  - c. Application to Client’s Situation Close: Example: “In your situation, this [product or service] would . . . [name the benefits the client would experience and the problems it would solve]. Does that make sense?”
  - d. Ask the client to make a buying decision. Examples:
    - i. “Based on our conversation, would you like A or B?”
    - ii. “Our next step is to fill out some paperwork. Is this the correct spelling of your name?”
6. **Answer Objections:** 2 to 3 objections are a normal part of the sales process! It means the client is actually thinking about the product or service.
7. **2<sup>nd</sup> Close on solution** [or alternate solution if the objection is strong]
8. **Answer more objections** - then close on solutions.
9. **Take action** when the client makes a decision.

## Secret to understanding closing:

- i. “Yes” means “Yes”
- ii. “Anything else” means “No”- it is an “objection”
- iii. “No” is an “objection” not a decision – it means there are unanswered questions
- iv. “I want to think about it” means “No” – see above
- v. When the client says “No” [or “Anything else”] 3 times – you can treat it as a decision.

**“Firing” an indecisive client who will not say “yes” or “no”:** “It does not look like you are ready to make a decision today. Why don’t you take the material and think it over and call me when you are ready to move forward?”