

## 5.5: Putting It All Together

### Learning Objectives

- Learn the five steps of a successful sales presentation.

As you have probably realized by now, there are many things to keep in mind when planning and executing a sales presentation. It can be enough to overwhelm even the most experienced sales professional.

While there is no one magic formula that will make your presentation come to life, successful presentations generally have a number of elements in common. Thinking of your presentation in terms of the following five steps will help you to plan and execute it with greater ease and success. Before the presentation, it's a good idea to ask your prospect how much time is allotted for your presentation. That will help you tailor your presentation appropriately, keeping in mind your prospect's time. It's also a good idea to start the meeting by setting expectations in terms of time: "Just as a time check, I'll spend thirty minutes on the presentation and allow fifteen minutes for discussion. We'll plan to wrap up by 11 o'clock."

### Step 1: Build Rapport

In relationship selling, building rapport with your prospect lays the foundation for a selling partnership that could continue for many years. Especially if the sales presentation will be your first in-person interaction with your prospect, put effort into making a good impression. Offer your prospect a firm handshake and start with some small talk to break the ice. This isn't difficult; you can establish a connection with a complete stranger over something as simple as the weather or a recent sporting event. Experienced salespeople use observation to their advantage, learning about the customer by noticing the environment of the prospect's office. Are their photographs or artwork displayed on the walls? What items does the customer keep on her desk? As Bruce Harris, account manager with UPS, says, "A person's office is a reflection of who they are and serves as an insight into his/her personality." Bruce Harris, "The Eyes Have It," *American Salesman* 54, no. 3 (2009): 17 You can make a personal connection and break the ice by questioning your prospect about a family photograph or a trophy he keeps on display. However, make sure not to go overboard on the small talk. Remember that your prospect is busy and has a limited amount of time to meet with you. If you spend too long on chit chat, you will eat up some of the time you need to get through your call objectives. Build rapport and then get down to business. Neil Rackham, *SPIN Selling* (New York: McGraw-Hill, 1996), 144. This is also a perfect time to confirm the time that is allocated to you for your presentation. Although you discussed it when you set up the appointment, it's always a good idea to confirm since things change at the last minute. This will help you quickly make adjustments if need be.

In group presentations, it is harder to leave room for small talk because if everyone starts talking, the meeting could lose its focus quickly—and in very large sales presentations, small talk is impossible. You could open your presentation with a memorable remark: something challenging or amusing; or a brief anecdote that establishes a common connection: "When I dropped my son off at school this morning, he told me to make sure not to give a boring presentation today...." A comment like this might get a chuckle out of your audience and will build a connection because others in the audience probably have children as well and may have had common experiences.

Leading your presentation off with situation questions is another way to break the ice and get people talking. In group settings, people are often uncomfortable sharing their opinions right away, but if you ask questions that call for factual observation, rather than opinion (How many departments in your organization would be affected by this decision? What is the average turnaround time once an issue goes to press?), people can answer without feeling threatened. Gary M. Grikscheit, Harold C. Cash, and Clifford E. Young, *The Handbook of Selling: Psychological, Managerial, and Marketing Dynamics*, 2nd ed. (Hoboken, NJ: Wiley-Blackwell, 1993), 158. Once you get people talking, you can lead into problem and implication questions that require your audience members to voice an opinion.

Recall from the last section that it's always a good idea to recap the findings of your last meeting in the opening of your call. This is another way to build rapport, remind your customer of your previous discussion, ensure that everyone is on the same page, and transition into your business topic.

### Step 2: Make a General Benefit Statement

Keep in mind that to effectively demonstrate capability, you should sell benefits—solutions that address your prospect's specific needs—rather than features or advantages. If your sales call is a follow-up on a previous call, you can make a benefit statement

early on that will address issues you discussed in your last meeting:

In our previous discussion, you mentioned that you had a minimum ROI requirement of 20 percent per year, and you said that you would be interested in pursuing this sale further if we could propose a solution that would meet your requirements. I've created an ROI analysis here that shows how outsourcing your back office work through our firm will yield an annual ROI of 25 percent. Other businesses like yours have experienced these results with us and have been very satisfied with the transition. Here's what we envision for your company. (Show a slide with a diagram or chart giving a visual representation of your prospect's cost savings with this solution.) Is this something you would be interested in?

In this general benefit statement, the salesperson has

- recapped the findings of the previous conversation to provide context,
- explained the value in an *idea* that meets the customer's needs, rather than trying to sell a service,
- helped the customer to see himself as part of the story,
- used a closed-ended question to lead into the rest of the presentation.

**Closed-ended questions**—questions that demand a yes or no response—can help to move your presentation forward, keep your customer involved throughout the presentation, and confirm your understanding. Closed-ended questions have a role during your sales presentation, as demonstrated above.

However, closed-ended questions should be balanced with **open-ended questions** that will help you probe further into the problem your product can solve. For instance, you might ask, "What are some of your biggest frustrations with your current back office operations?" It is virtually impossible to learn more from your prospect if you don't use open-ended questions. If you are interested in learning more and engaging your customer in your presentation, be ready with open-ended questions. For example, the situation, problem, implication, and need-payback questions in SPIN selling are all examples of open-ended questions. Open-ended questions start with "who," "what," "when," "where," or "why." Figure 5.5.7 provides examples of closed-ended and open-ended questions.

Closed-Ended Questions	Open-Ended Questions
Do you know who your target customer is?	Who is your target customer?
Are you open on the weekends?	What are your store hours?
Are you planning to launch the new software in the second quarter?	When are you planning to launch the new software?
Is your warehouse in the area?	Where is your warehouse located?
Are you considering a change?	Why are you considering a change?

Figure 5.5.7: Examples of Closed-Ended and Open-Ended Questions

Asking the right questions is one of the skills required to be a successful salesperson. This is where your ability to ask the right questions really comes into play. It is the open-ended questions that you ask during this portion of the presentation that set the tone for the rest of your presentation. But don't stop here. Ask open-ended questions throughout your presentation to engage the prospect and continue to gain valuable information.

### Step 3: Make a Specific Benefit Statement

Once you have investigated to uncover your prospect's needs, deliver a specific benefit statement: one that demonstrates in detail how you are going to solve his unique problem. It's impossible to deliver a specific benefit statement at the opening of your sales call because there is no way you can understand your prospect's needs and expectations without listening to him first. Michael T. Bosworth, *Solution Selling: Creating Buyers in Difficult Selling Markets* (New York: McGraw-Hill, 1995), 101. Sometimes, a prospect may ask you to solve a problem that sounds similar to one you just solved for another company or customer, but if you assume you already understand your prospect's situation and treat her just like your old customer, you might lose the sale. Approach each new presentation as if it were your first.

In B2B sales, the specific benefit statement is generally something you prepare before your presentation. However, before launching into specific benefits, you can investigate to make sure you understand and have all the necessary information: "So let me make sure I understand. What you're saying is that a 5 percent reduction in process time will reduce your costs by 20 percent?" In any selling situation, the information you get from your prospect is usually just the tip of the iceberg, and you won't get an idea of the pressures she is facing unless you can get her talking.

After confirming that you and your prospect are on the same page, you can move forward with your presentation, adapting if you need to based on your prospect's answers to the questions you asked. This is the part of your presentation where the solution really

comes to life. Bring your customer into the story with videos, recordings, displays, or anything else that will allow him to experience the product for himself.

<b>You:</b>	So let me just confirm—it sounds like your biggest priorities in purchasing this SUV are gas mileage, safety, and reliability and that you would sacrifice some luxury features if your vehicle met these other conditions?
<b>Prospect:</b>	Yes, those are definitely the most important things. This is really going to be a family car, something I can use to drive the family around and take on camping trips. And our oldest child is going to college soon, so we want a car that will last for a while because we'll need to save money to pay tuition.
<b>You:</b>	OK Cindy, then I think you will be excited about the RAV4 we discussed earlier. It has the best fuel economy of almost any SUV on the market, and Toyotas are known for their reliability, so this car should last you well past the time your daughter graduates from college. You can also feel confident when you drive your kids around in this vehicle because the RAV4 received five stars in National Traffic Safety Administration crash tests. Joshua Rose, "New 2009 Toyota RAV4 Features and Prices," Auto Broker Magic, <a href="http://www.auto-broker-magic.com/2009-toyota-rav4.html">www.auto-broker-magic.com/2009-toyota-rav4.html</a> (accessed May 16, 2010). Does that sound like a good option to you?
<b>Prospect:</b>	Yes, that sounds like just the kind of thing we're looking for.
<b>You:</b>	Great! Then why don't we go for a test drive, and you can see for yourself how well this car handles on the road.

When you demonstrate your product for the prospect, make sure to draw attention to the features, advantages, and benefits that make it a good solution for her particular situation. In the example above, when your prospect takes the car out on the road, you could turn on the climate control settings that allow her to adjust for a different climate zone in the front and back seats and explain that this way she and her family can stay comfortable on long car rides. If she has her kids along, you could turn on the rear DVD player for them. These sort of extra, customer-specific benefits help your customer to make a personal connection to the product and to see her story aligning with your solution.

During this part of the presentation, make sure to ask open-ended questions that will help you learn more about the prospect's needs and her perceptions about the product: "You said that you like to go on family camping trips; how well does your current vehicle meet your family's needs on these trips? It sounds like your current vehicle gets poor gas mileage; how does this affect your frequency of use or the length of your road trips? How would the storage capacity of the RAV4 change the way you use your family vehicle? How important is the car's sound system to you?" Not only will these questions help you to uncover your customer's needs and expectations that are still below the surface, but they will also help you to anticipate potential objections as you transition to the next part of the selling process.

## Step 4: Presentation

This is the reason you are here—to present your solution that will solve your prospect's problem. Since you started your presentation by asking questions, your presentation is a perfect way to incorporate the things you just learned from your prospect and incorporate them into your presentation. Yes, this means you have to be quick on your feet. That's another reason preparation is so important. It allows you to be comfortable with your presentation material, yet customize it on the spot to point out specific areas that address your prospect's problem.

You are taking the prospect on a journey so make it interesting, compelling, and relevant. Here are a few tips:

- **Keep your presentation concise.** A shorter presentation is better. It helps you get to the point more quickly and have more time for dialogue with your prospect.

- **Start with a quick review of the prospect's objectives.** This is a good technique to confirm that you were listening to your prospect throughout the process so far and confirms that you are on the same page. This also provides the ideal platform on which to present your solution and why it will help your prospect reach his objectives.
- **Get a reaction from your prospect throughout your presentation.** Use a combination of open-ended and closed-ended questions to confirm that your prospect is in agreement with the information you are presenting and to gain new insights into how your product or service can help him. "This time savings in your production cycle can help you save at least 10 percent over your current processing. Would you like to see how this would work?" is an example of a closed-ended question that helps keep your prospect engaged. "How do you think your team would like to submit invoices like this?" is an example of an open-ended question that helps the prospect think about the product or service in use in his organization.
- **Use demonstrations whenever possible.** Showing how a product or service will work is far more dramatic and memorable than simply talking about it. If it's possible to demonstrate the product in person, do it. If not, have a demonstration video. Bring samples, mock-ups, or prototypes if the actual product is not yet available.
- **Have fun.** When your passion and enthusiasm come through, it makes a difference to your prospect. A monotone or boring presentation is neither interesting nor compelling. Show your prospect you believe in your product or service with a powerful and personal presentation.

### Step 5: Close

If you have successfully delivered value to your prospect in your presentation, it is time to think about closing the sales call. This is where you obtain your customer's commitment, either to buy or to move the sales process forward. Especially if you are expecting your prospect to make a purchase at the end of the sales call, it is a good idea to use a **trial closing** technique to test his buying readiness. How likely is he to make a commitment now? By testing the waters with a trial close (e.g., "On a scale of one to ten, how important would this opportunity be to you?"), you can ask your prospect for an opinion rather than asking him for a commitment, so there is less pressure for both of you. A negative response to a trial close doesn't mean that your prospect won't buy or move forward with the sale; instead, it is a signal to change your strategy. A trial close often leads to objections that you will need to overcome before your prospect feels prepared to make the purchase. Jim Holden, *The Selling Fox* (Hoboken, NJ: John Wiley and Sons, Inc., 2002), 25. Chapter 11 discusses overcoming objections in greater detail.

If your prospect responds positively to your trial close, it is time to close the sales call by asking for a commitment. There are a variety of closing techniques you might use that will be discussed in greater detail in Chapter 7. Whichever closing technique you choose will depend on the customer, the selling situation, and your goal for the end of the sales call.

### Step 5: Recap

According to sales trainer and experienced salesman Tom Hopkins, all successful presentations and demonstrations have three steps: tell your audience what you're going to tell them, tell them what you're there to tell them, and tell them what you've just told them. Tom Hopkins, "Giving Champion Presentations," *Entrepreneur*, February 7, 2005, <http://www.entrepreneur.com/sales/presentations/article75918.html#ixzz0LqUNOCM3> (accessed May 27, 2024). After making your presentation and successfully closing, recap the important points of your meeting and the direction you and your customer have agreed to take from here: "I'll touch base with you tomorrow once you've checked on that budget detail, and in the meantime, let me look up those part specifications for you." This will reinforce the prospect's decision and pave the way for the next steps, which may include anything from follow-up, to a next meeting, to a formal proposal, depending on the selling situation and the length of the sales cycle.

### Role of the Proposal in the Sales Presentation

In many B2B sales and some larger business-to-consumer (B2C) sales, once you have presented your solution, if your prospect is interested, she will ask for a **proposal**—a document that proposes the specific terms of the sale, including pricing, delivery time frame, and the scope of the products or services you are offering. In relationship selling there is no such thing as a standard proposal; the proposal should include the details of a customer-specific solution and should reflect the things your customer values most. Even in retail situations—like car buying—while you might have a basic template you use for your contracts, you will adapt and renegotiate the contract depending on your customer's needs. The key is that the proposal, like your presentation, should be customized to the individual prospect.

## Nitty Gritty: The Hows and Whys of a Proposal

While every proposal should be customized, there are a few common elements that good proposals share:

- an introduction
- a definition of the project or need
- a discussion of the solution and its benefits
- the costs associated with the project
- a time frame for completion of the project or project milestones
- a call to action that asks the prospect for a response
- evidence that you are qualified to perform the job.

In addition, a proposal should accomplish three things:

1. Educate the prospect about the specifics of his need and the pertinence of your solution.
2. Convince the prospect that you have the competence to deliver what she needs.
3. Provide justification for the prospect's investment in clear terms.

In some B2B situations, your customer might submit a formal **request for proposal (RFP)**, which sets out very specific guidelines for the format of the proposal and the information it should include. Organizations usually use RFPs when they are requesting proposals from a number of potential suppliers at once. By providing a proposal structure, RFPs simplify the process of assessing risks and benefits associated with the purchase and can help your prospect make a decision in complex buying situations.

Whether or not you are responding to a formal RFP, here are a few things to keep in mind:

- *Do* make sure most of the document discusses your prospect and his objectives and how you and your company will meet them.
- *Do* keep the writing clear and concise. This will make it easy for your prospect to assess the proposal, and it demonstrates a respect for his time on your part. Select the most relevant information and present it in an efficient way.
- *Do* make sure you understand how the proposal will be reviewed, who will be reviewing the proposal, what the primary selection criteria will be, and when you can expect a response.
- *Do* use a straightforward approach to pricing that your customer can easily assess.
- *Do* pay attention to the visual presentation of the proposal.
- *Do* make it easy for the prospect to accept your services by attaching an agreement he can sign that outlines the terms of the contract.
- *Don't* forget to check grammar and spelling. This is an important part of credibility and professionalism.
- *Don't* overuse “we” or “us.” Your language should reflect a customer centered focus.

Figur

## Timing: When to Deliver Your Proposal

Have you ever noticed that when you go into a high-end clothing boutique or a store that sells expensive jewelry and watches, the price tags are hidden? The thing you immediately see is the product itself, beautifully displayed. The goal is a psychological one: to get the buyer to make an emotional connection with the product before he considers the cost. As a buyer, if the cost were one of the first things you saw, you might never make that emotional connection with the product in the first place.

This is something to keep in mind in sales. Never present a proposal—or otherwise mention pricing—early on in the sales presentation, not until your prospect has fallen in love with your product. You want your prospect to pick out the color of the car before she asks about payment; if she picks out the color, she has already imagined herself owning the car, and you have probably made your sale.

Of course, in a situation like car sales, you generally present the proposal in the same day as you present the product. You discuss your prospect's needs, show him the car, let him test drive it, and then tell him, “Let me go talk to my manager to see if we can work out the numbers.” The process is a relatively simple one. However, in complex B2B sales, your sales presentation will probably *end* with a request for a proposal, in which case you will agree to a future meeting when you can present your proposal to the customer. B2B proposals are generally more involved, and so they require careful planning and a greater investment of time. If your prospect says, “Just send us the proposal,” ask for a face-to-face meeting; you can always send them the proposal ahead of time, but following up with a meeting in-person will help you address objections, answer your prospect's questions, and demonstrate your enthusiasm for the project.

## Delivering Value in Your Proposal

Until you understand the areas in which your customer places the greatest value, it is impossible to come up with a proposal. For instance, say your organization offers advertising services, and you find out from your prospect that her company especially values competitive pricing on individual projects. You decide the best way to deliver value is to drop your pricing below the competitor's lowest price and to make up for the lower cost in your **retainer fee**—the fixed fee that your customer will pay in advance to secure your services. This way you can deliver value in the area that is most important to your customer while still generating the profits you need to run your business. In the end, you want a situation where everyone wins—but it takes some work to uncover the key to making this happen.

Sometimes your customer's area of greatest value is determined by business needs, and other times the issues are emotional. For instance, if you are selling a car to a customer that wants a good value on his trade-in, recognize that he might have an emotional connection to his old car (in his mind it has a high value), so offering a low trade-in price, even if it is combined with competitive financing options, might be enough to drive your customer away. In fact, your customer might actually be willing to pay *more* for his new car if you can give him a good price for his trade-in.

## Key Takeaways

- The most important ingredient of a successful sales presentation is you.
- While there is no single formula for a sales presentation, there are five basic steps: building rapport, making a general benefit statement, making a specific benefit statement, closing, and recapping.
- It's best to ask questions throughout your presentation to learn as much information as possible from your prospect and to keep him engaged.
- **Closed-ended questions** help keep the prospect engaged and should be balanced with **open-ended questions**, which help you probe further into the problem your product can solve.
- The proposal is a written document that includes the specific terms of the sale and is usually prepared after the sales presentation.
- Some prospects submit a **request for proposal (RFP)**, usually when they are evaluating proposals from a number of potential suppliers, which sets out specific guidelines for the format of the proposal and the information it should include.

### ? Exercise 5.5.1

1. Develop two examples each of closed-ended questions and open-ended questions. Ask both questions to at least five of your friends and document the responses. Which type of question was easier to control? Why? Which type of question provided more information? Why? How might you use both types of questions in a sales presentation?
2. Develop a five-minute sales presentation to sell your college to high school seniors using the five steps described in this section. Role-play your presentation. Is it difficult to stay within the time constraint? How should you adjust your selling presentation when you have a limited time frame to present?
3. Assume you are selling biodegradable bags to a major grocery store chain. The bags are 100 percent biodegradable and are priced comparably to non-biodegradable bags. You are meeting the eight -person buying committee for the first time. Role-play how you would build rapport with the group before you begin your presentation. What questions would you ask to begin your presentation? What general benefit statement would you make?
4. Go to Best Buy or another electronics store and assume you are buying a new computer. What questions does the salesperson ask before he shows you a specific model? Which questions were closed-ended? Which questions were open-ended?
5. Imagine that you are selling children's books to Barnes and Noble and you arrive at the corporate office to make your presentation and your contact tells you that due to scheduling changes, he can only give you half as much time as he originally planned. How would you adjust your sales presentation?
6. Choose a product or service that can be demonstrated or sampled (e.g., a website, software, food, or a beverage). Create a five-minute sales presentation using the concepts in this section and incorporating the demonstration.
7. Assume your prospect is a restaurant on or near campus. Develop a new product or service that your prospect can offer to increase traffic during off-hours. Create a five-minute presentation using the concepts covered in this section.
8. Assume your prospect is one of your classmates. Create a five-minute sales presentation for an iPhone 15 using the concepts covered in this section. Include a trial close when you present to your prospect.

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