

## 10.2: Preparation - Your Key to Success

### Learning Objectives

- Learn how to prepare for a sales presentation.

You've made it! After all your hard work you have reached the point in the selling process where the qualifying, researching, and planning stages pay off. Finally, your story and the customer's story are about to connect in an exciting way. Most salespeople think of the presentation as the best part of the selling process. It's the opportunity to show the prospect that you know your stuff—and the chance to deliver value by putting your problem solving skills to work. So get ready, visualize the best possible outcome to your sales presentation, and take the necessary steps to make this outcome a reality.

### Keep Your Eye on the Prize

As excited as you might be about your product, or as eager as you are to demonstrate your solution, keep in mind that your sales presentation is primarily about building a relationship and beginning a partnership, especially in the business-to-business (B2B) arena. When Selena Lo, CEO of Ruckus Wireless, is gearing up for a sales presentation, she focuses her final preparations on making it personal. Lo's company specializes in wireless routers that handle video, voice, and data capabilities for businesses. When she identifies a prospect, Lo's first priority is finding the person she refers to as “the fox”: her ally in the prospect company who wants to see technological changes take place in his organization. Lo gives this relationship special attention, often inviting this individual out to dinner before the presentation to win his loyalty and get any additional details about his company.

Several days before the presentation, Lo researches everyone who will be in the meeting. She reads their bios and Googles them to find out their employment histories. “You don't want someone to think you checked out their entire past,” says Lo, but “you try to strike up more links between you and that person.” She prepares the seating arrangement for the sales meeting strategically, making sure that she will be sitting directly across from the highest-ranking person there so that she can make eye contact. On the day of the presentation, she asks a member of her sales team to write down each person's name when they walk in the door—and to make a point of using the names during the presentation. Stephanie Clifford, “Find the Fox,” *Inc.*, February 1, 2007. Lo's efforts to give the sales presentation a personal touch are a reminder that in relationship selling, you can never lose sight of the most important thing: your customer. Coach yourself on this on the day of your presentation and keep it in mind in the days leading up to it. What can you do to personalize this presentation and show your customers that it's all about their organization?

Taking a customer-centric approach lies at the heart of delivering value. In these terms, value isn't about offering a good price. It's not just about solving the customer's problems either. As Tom Reilly, author of *Value-Added Selling: How to Sell More Profitably, Confidently, and Professionally by Competing on Value, Not Price*, explains it, delivering value means that you “define value in customer terms, ask questions, listen to customers, and put the spotlight on customer-centric solutions.” Tom Reilly, *Value-Added Selling: How to Sell More Profitably, Confidently, and Professionally by Competing on Value, Not Price*, 2nd ed. (New York: McGraw-Hill, 2002), 23–24. This might mean that it takes more than one meeting to close your sale; you might need several visits to adequately respond to your customer's needs. According to one study, “Today's presentations typically are conducted over several meetings, with the salesperson often doing more listening than talking.” William C. Moncrief and Greg W. Marshall, “The Evolution of the Seven Steps of Selling,” *Industrial Marketing Management* 34, no. 1 (2005): 18. Make it your goal to see that you and your prospect get what you want out of the meeting.

It's a good idea to visualize this outcome before going into the meeting. Review your precall objectives. What will it look like to achieve these objectives? What steps will you and your prospect have to take? How will it feel when you both have achieved your goals? This isn't just about calming your nerves; visualizing the outcome you want is actually a powerful tool to help you achieve that outcome. For one thing, it's another form of planning. If you mentally run through a “movie” of the sales presentation, allowing yourself to picture your reactions and the steps you will take to close in on your objective, you will be better prepared when the meeting takes place. Richard White, “Déjà Vu,” Pro Excellence. Each step of the presentation will come naturally to you because you have already mentally rehearsed, and you will be better positioned to sell adaptively because you have already imagined a number of possible scenarios and customer responses.

For another thing, **mental rehearsal** fools your subconscious mind into believing you have already achieved your goals. Sales trainer and CEO Brian Tracy says, “Your subconscious mind cannot tell the difference between a real experience and one that you vividly imagine,” so if you imagine a successful presentation and its outcome several times before your *actual* presentation, you will be as calm and confident as if you had already closed the sale. You will smile more easily, you will speak more slowly and

clearly, and you will command attention. In addition, if your subconscious mind believes you have already been in this situation before, it will direct you to say and do the things you need to achieve your objective. Brian Tracy, *Advanced Selling Strategies* (New York: Simon & Schuster, 1996), 80.

## The Power to Adapt

The sales presentation is where adaptive selling makes all the difference. Up until this point, you have researched and prepared and developed a solution that you think will meet your prospect's needs, but walking into the presentation and delivering on that preparation requires a different set of skills. Among other things, it requires flexibility and the ability to think on your feet. The best salespeople adapt their presentations to their prospect's reactions, and they go in knowing they may have to adapt to surprises for which they were unable to prepare (maybe the building has a power outage during the slideshow, for instance, or maybe one of the people from the customer organization decides to send another employee in his place at the last minute). These top-performing salespeople know that keeping a customer-centric focus, visualizing a successful outcome, and mentally rehearsing your presentation before you deliver it will give you the power to adapt with confidence and ease.

Adapting is all about listening. As Paul Blake noted in the video ride-along at the beginning of the chapter, your sales presentation is really a compilation of all the listening you have done to this point. And listening doesn't stop there. It's impossible to adapt if you're not listening. When you are creating your presentation, keep in mind that it is not a one-way communication. Presentations are for listening, adapting, and solving problems.

## Video: 5 Listening Skills for Salespeople | 5 Minutes Sales Training

*This video highlights the power of listening and tips to listen effectively during your presentation*



## Logistics Matter

There's nothing worse than putting hours into preparing a killer sales presentation, only to blow your chances because you forgot to bring an important part of your demonstration or because you got lost on your way to the meeting. Don't let disorganization hold you back: take charge of the details so that your only concern on the day of the presentation is the delivery.

## The Night Before

The evening before your meeting, read over your precall objectives; practice your presentation a number of times out loud; and walk through your mental rehearsal, visualizing success. You can't practice too many times. The content of your presentation should be second nature by the time you get up in front of your audience so that you can focus your energy on your prospect. Rehearsal is one of the best ways to calm your nerves so that you can focus on delivering your presentation naturally and connecting with your prospect.

### ✓ Power Player: Lessons in Selling from Successful Salespeople

#### Rehearse Your Way

Andres Mendes, global CIO of Special Olympics International, says that rehearsing out loud makes him too nervous; he likes to leave room for spontaneity and adaptation. Mendes develops the big themes of the presentation and maps these out into

PowerPoint slides that tell the whole story. “I time the slides to move exactly at my pace, so I rehearse the mechanics and make sure those are right,” he says. Maryfran Johnson, “Rehearsing Success,” *CIO Magazine*, June 10, 2009, [http://www.cio.com/article/494729/Why\\_Even\\_Successful\\_Speakers\\_Need\\_To\\_Practice](http://www.cio.com/article/494729/Why_Even_Successful_Speakers_Need_To_Practice) (accessed May 16, 2010).

*CIO Magazine* columnist Martha Heller, on the other hand, likes to rehearse in the traditional style, delivering the presentation out loud and pacing the room as if she were in front of an audience. She never rehearses the opening though. She likes to adapt her comments to the immediate situation and energy in the room. Maryfran Johnson, “Rehearsing Success,” *CIO Magazine*, June 10, 2009, [http://www.cio.com/article/494729/Why\\_Even\\_Successful\\_Speakers\\_Need\\_To\\_Practice](http://www.cio.com/article/494729/Why_Even_Successful_Speakers_Need_To_Practice) (accessed May 16, 2010).

The bottom line? While nearly all top-performing salespeople rehearse, not all approach rehearsal in the same way. Find the style of rehearsal that works best for you. Additionally, don’t let your rehearsal lock you into delivering a rigidly defined set of remarks. You have to leave room for flexibility and adaptation.

The night before, you should also get together all the materials you’ll need for your presentation—handouts, files, product samples, and contracts—and have them ready to go for the following morning. This will save you time tracking down loose supplies at the last minute, when you’re trying to get out the door to make it to your meeting. It’s also a good idea to set out your clothes the night before for the same reason.

If you are planning to use multimedia equipment in your presentation, make sure in advance that your prospect will have everything you’ll need to make it run. If you aren’t sure, bring everything (e.g., cables, adapters, remotes) with you. And of course, make sure you know how to use all your equipment. When Keith Waldon, CEO of Earth Preserv, was preparing for a meeting with JCPenney, one of his biggest prospects, he spent hours rehearsing with his multimedia equipment. The technology was a key element of his presentation, and he wanted to make sure everything would work perfectly for the big day. “I had to learn how to use all the remote-control equipment,” he says. Waldon also brought a technical assistant with him as backup to safeguard against any glitches. Susan Greco, “Anatomy of a Launch: The Five-Hour Multimedia Sales Presentation,” *Inc.*, October 1, 1995.

## Getting There

It might surprise you to know how often salespeople show up late to their own presentations because they get lost on the way to the meeting. When you are traveling to an unfamiliar place for your appointment, get directions in advance, and allow extra travel time in case of traffic delays or wrong turns. Make sure you also research the parking situation beforehand. If your prospect is a large corporation with its own complex, are there reserved employee lots and visitor lots? Will you have to walk a considerable distance from your car to the meeting room? If you’ll be meeting in an urban area, is street parking available, or will you have to find a parking garage? You don’t want to arrive on time only to get delayed because you spent twenty minutes driving around in search of a parking spot. It’s a good idea to make a “test” trip in advance of your meeting. That will help avoid surprises with traffic, parking, security, or other areas that might cause a delay. If something unavoidable *does* come up to set you back, make sure you call ahead to let your customer know you will be arriving late.

Besides the extra time you allow for travel, plan to arrive at the meeting a little early. Not only does this convey professionalism, but it also gives you the time to mentally prepare once you arrive and to set up any equipment you’ll be using. It’s a good idea to allow time to stop in the restroom and take one last look to be sure you’re at your best (and it’s a good time to use a breath mint). Finally, bring something to read in case you have to wait: a business magazine, a newspaper like the *Wall Street Journal*, or maybe a Kindle.

<input type="checkbox"/>	Assemble supplies such as documents, brochures, product samples, contracts, files, thumb drives, CDs, projector, laptop, cables, remotes, pens, pointers, precall objectives, and client information.
<input type="checkbox"/>	If you plan to use handouts, make sure you have enough copies.
<input type="checkbox"/>	Check your clothes. Does anything need to be ironed? Do you have the right shoes, socks, tie, panty hose, and so forth for the suit?
<input type="checkbox"/>	Make sure you have directions to your meeting. Do you know which building you are meeting in, which entrance to use, and how to find the meeting room?
<input type="checkbox"/>	Research the parking situation.
<input type="checkbox"/>	Write down a contact number or put it in your cell phone to call in case you are unavoidably delayed.
<input type="checkbox"/>	Rehearse your presentation.
<input type="checkbox"/>	Review your precall objectives and visualize success.

Figure 10.2.1: Prepresentation Checklist

## Key Takeaways

- When preparing for your sales presentation, stay focused on the essentials: your relationship with the prospect and your precall objectives.
- Practice **mental rehearsal** by visualizing the best possible outcome to the sales presentation.
- Delivering value to the customer means practicing adaptive selling and listening to the customer to understand her needs. Keep this in mind before and during the presentation.
- The night before your presentation, make sure you have all the logistics worked out: your equipment, your wardrobe, directions to the location, and parking information.

### ? Exercise 10.2.1

1. You are preparing for a presentation with three executives to be considered for the internship or job you really want. List the steps you would take to rehearse your sales presentation, making sure to leave room for adaptability.
2. You are preparing a presentation for representatives from a large department store who are considering buying your line of men's shoes. There will be six representatives present, none of whom you have met in person before. You have heard from your original contact at the company that one person in the group is against purchasing your product because he believes he already has something in the line that has the same look. List some things you can do to prepare for this presentation that will address the prospect's concerns.
3. Assume you are a real estate agent and you are selling the dorm room, apartment, or home in which you live. Create a short sales presentation. Rehearse it so that the presentation takes only three minutes. What is the way that works best for you to rehearse?
4. Assume you are sales rep for a major telecommunications company and you are preparing a presentation for a buying group at a national retailer. Identify four sources you would use to personalize the presentation to the people in the room. How would you research each of the appropriate people?

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