

PROFESSIONAL SALESMANSHIP – LECTURE 8

CHAPTER 8 – Planning Sales Dialogues and Presentation

Objectives

After completing this module, you should be able to

Certainly! Here are the rephrased statements:

1. Gain insight into different methods of communicating with potential prospects and customers, including canned sales presentations, written sales proposals, and structured sales dialogues or presentations.
2. Provide a rationale for the prevalent use of organized sales dialogues and presentations over canned presentations or written proposals.
3. Explore the nine elements comprising the planning framework for an organized sales dialogue or presentation.
4. Describe the process of crafting a customer value proposition statement.
5. Establish the connection between the reasons for purchasing and the advantages of the seller's product, substantiate the assertions made regarding these advantages, and reinforce verbal assertions.
6. Initiate interaction with the customer by arranging appointments.

PLANNING SALES DIALOGUE AND PRESENTATION

Most sales calls involve sales dialogue, which are business conversations between buyers and sellers that unfold over time as salespeople strive to initiate, develop, and enhance customer relationships. The term "sales conversation" is often used interchangeably with "sales dialogue." Some sales calls include sales presentations as part of this dialogue. Sales presentations are

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comprehensive communications that convey multiple points designed to persuade the prospect or customer to make a purchase. The best sales presentations focus on customer value and occur only after the salesperson has completed the ADAPT process. This process involves: Assessing the customer's situation; Discovering their needs, buying processes, and strategic priorities; Activating the buyer's interest in solving a problem or realizing an opportunity; Helping the buyer Project how value can be derived from a purchase; and then Transitioning to the full sales presentation. Salespeople who attempt to deliver a sales presentation without first building a foundation through sales dialogue risk being perceived as not customer-oriented and overly aggressive.

To better understand the process of planning sales dialogues and presentations, we will explore the three most common approaches: the canned sales presentation, the written sales proposal, and the sales dialogue. These methods differ significantly in their levels of customization and customer interaction. Among them, the sales dialogue is the most tailored to individual customer characteristics. We will introduce a planning template to guide both sales dialogues and comprehensive presentations, and conclude with strategies for fostering effective sales dialogues when initiating customer relationships.

SALES COMMUNICATIONS FORMATS

A salesperson might employ one or more of these formats with a particular customer, each offering unique advantages and disadvantages. For successful communication, the message must be both credible and clear. Additionally, the salesperson should engage with the customer in the right setting and at an appropriate time to maximize the chances of a positive outcome.

Canned Sales Presentations

Canned sales presentations encompass scripted sales calls, memorized presentations, and automated presentations. Automated presentations extensively use computer images, videos, tapes, or slides to convey information to the prospect. Most canned sales presentations are

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tested with real customers for effectiveness before being distributed to the sales team. These presentations are typically comprehensive and logically structured. Anticipated objections and questions are addressed in advance, with appropriate responses integrated into the presentation.

The highly structured and inflexible nature of canned sales presentations means they remain consistent across different customers. When well-designed, they are logical and thorough, minimizing sales resistance by preemptively addressing potential objections. This format can be particularly useful for relatively inexperienced salespeople and can boost their confidence.

Canned sales presentations operate under the implicit assumption that customer needs and buying motives are uniform. As a result, they fail to leverage a key advantage of personal selling—the ability to adapt to diverse customers and various selling situations. Most consumer-based telemarketing sales calls follow this formula. While effective in some cases, canned presentations are often inappropriate because they limit customer interaction. During a memorized presentation, the salesperson speaks 80 to 90 percent of the time, allowing the prospect to express their feelings, concerns, or opinions only occasionally. Unfortunately, the salesperson does not attempt to determine the prospect's needs, delivering the same memorized pitch to all. They must assume the buyer's needs and hope that an engaging presentation of product benefits will lead to a sale. The major limitation of the canned sales presentation is its inability to capitalize on the strength of personal selling—the customization of the message to the prospect. Additionally, it struggles with interruptions, may be awkward to use with a broad product line, and can alienate buyers who prefer to participate in the interaction.

Written Sales Proposals

The second primary type of sales communication is the written sales proposal. This is a comprehensive, self-contained sales presentation, typically supplemented by other verbal presentations either before or after its delivery. Sometimes, a customer might receive a proposal and then ask the salesperson to make a follow-up call to further explain the details and address any questions. Conversely, initial sales presentations may culminate in the delivery of a sales proposal. Regardless of the sequence, the sales proposal should be crafted after the salesperson has thoroughly assessed the buyer's situation in relation to the seller's offering.

Writing Effective Proposals

Whether the proposal responds to a buyer's request for proposals (RFP) or is created to complement and strengthen a sales presentation, it is crucial that the proposal is well-written and presents the necessary information in an appealing manner.

Executive Summary

This summary precedes the full proposal and serves two critical functions. First, it should succinctly and clearly demonstrate the salesperson's understanding of the customer's needs and the relevance of the proposed solution. An effective summary will outline the customer's problems, describe the proposed solution, and highlight the resulting benefits. The second function of the summary is to create a desire to read the full proposal. This is crucial because many key members of the organization often only read the summary. New salespeople frequently ask about the appropriate length for an executive summary. A good rule of thumb is to limit it to two typewritten pages, particularly if the main body of the report is fewer than 50 pages.

Needs and Benefits Analysis

This section typically consists of two main parts. First, the situation analysis should concisely explain the salesperson's understanding of the customer's situation, problems, and needs. Second, the recommended solution should be presented, supported by illustrations and evidence

showing how the proposed solution uniquely addresses the buyer's issues. The focus in this section should be on the benefits derived from the solution, rather than on the product or service being sold. It is crucial to describe these benefits from the customer's perspective. Proprietary information included in the proposal can be protected in various ways. The most common method is to place a notice on the document. Many technology companies also require the prospect to sign a nondisclosure agreement as part of the overall document, and in some cases, the selling organization may even copyright the proposal.

Company Description

Information about the supplier company offering the proposal is included to demonstrate why it is the best vendor for this solution. This section provides a brief overview and background of the firm, with an emphasis on the company's capabilities. Including case histories of customers for whom the company has solved similar problems with similar solutions is an effective way to document and illustrate organizational capabilities and past successes.

Pricing and Sales Agreement

The preceding sections aim to enhance the perceived customer value of the proposed solution. Once this value has been established, the proposal should prompt the customer to make a decision by presenting pricing information and delivery options. This information is typically laid out in the form of a sales agreement for the buyer to review, approve, and finalize.

Suggested Action and Timetable

The objective of this section is to facilitate the buyer's decision-making process as much as possible. Essentially, it should convey the message, "If you're interested in the proposal and ready to proceed, here's what you need to do." This may involve signing a contract, completing an order form, or following instructions on how to place an order or seek additional information.

Additionally, a timetable outlining the schedule of key implementation events should be provided.

Sales Dialogues and Presentations

Sales dialogues can either precede or follow other sales communications, such as a written sales proposal. They go beyond simple conversation, serving as an opportunity for the salesperson to gather information and/or prompt action from the prospect, while exploring the business motivations behind the prospect's interest in continuing the dialogue. Feedback from the prospect is welcomed, making this format less likely to alienate a buyer who prefers active participation.

In most cases, converting a prospect into a customer involves multiple sales conversations across several interactions. For instance, salespeople often engage in initial telephone conversations with qualified prospects to secure appointments for future meetings. Subsequent conversations with the customer typically revolve around gathering facts and mirror the ADAPT process. The next phase occurs after the salesperson has devised a tailored solution for the customer. While the salesperson may deliver a comprehensive sales presentation, it should be structured for ongoing dialogue with the customer. This style of presentation is known as an organized sales presentation.

To emphasize, this is not a one-sided presentation or monologue; it entails a sales dialogue with substantial customer engagement. Therefore, the organized presentation is also referred to as an organized sales dialogue.

Sales Dialogue and Presentation Template

A sales dialogue and presentation template serves as a valuable tool to ensure that all relevant content areas are addressed with each prospect. This template offers flexibility, allowing it to be utilized for planning a comprehensive organized sales presentation or guiding sales dialogues with a narrower focus. It is important to note that the template is not intended to serve as a script for sales encounters, but rather as a resource for planning and compiling the necessary information for the salesperson.

By addressing the outlined issues in the template, salespeople can facilitate trust-building by showcasing their competence, expertise, customer focus, transparency, reliability, and compatibility. While it's true that trust is primarily built through actions rather than just planning and intentions, salespeople who understand the factors essential for earning customer trust during the planning stages are better positioned to establish that trust in subsequent interactions with the customer.

The sales dialogue and presentation template are divided into nine sections, each of which is discussed individually.

Initiating Contact

Certainly, the initial moments of the sales call will be significantly influenced by any prior interaction between the buyer and the salesperson. For instance, if previous sales calls have already identified buyer needs and the buyer has consented to a sales presentation, the beginning of the call will differ substantially from a scenario where this is the first interaction with the prospect. The ADAPT questioning process can be utilized, either partially or in its entirety, to gather the necessary information and smoothly transition into the sales dialogue or presentation.

As a guideline, it's important for the salesperson to value the buyer's time and proceed to the presentation promptly when circumstances permit. However, the salesperson should not rush into the presentation prematurely, and certainly should not commence it without first establishing the buyer's needs and interest.

ENGAGING THE CUSTOMER

Securing appointments for most initial sales calls with new prospects is typically necessary. Requesting an appointment yields several favorable outcomes. Firstly, it communicates to the prospect that the salesperson respects their time. Secondly, it increases the likelihood of the salesperson receiving the undivided attention of the prospect during the sales call. Thirdly, scheduling appointments aids the salesperson in efficient time and territory management. The importance of setting appointments is underscored by a survey conducted among secretaries, administrative assistants, and other 'gatekeepers' responsible for appointment scheduling. A majority of respondents expressed the view that arriving unannounced for a sales call is a breach of business etiquette. Given the strong sentiments of those representing buyers, it is advisable to request an appointment whenever there is any uncertainty about its necessity.

SUMMARY

1. Understand alternative ways of communicating with prospects and customers through canned sales presentations, written sales proposals, and organized sales dialogues or presentations. Canned sales presentations include scripted sales calls, memorized presentations, and automated presentations. Most canned presentations have been tested with real customers before they are used by an entire salesforce. Canned sales presentations are usually complete and logically structured. Objections are anticipated in advance, and appropriate responses can be formulated as part of the presentation. A written sales proposal is a complete, self-contained sales presentation. A sales proposal should be prepared after the salesperson has made a thorough assessment of the buyer's situation as it relates to the seller's offering. An organized

sales dialogue or organized sales presentation is tailored to the prospect's particular situation and needs. It is a flexible format that allows for maximum input and feedback from the prospect. Sales dialogues and organized sales presentations (sometimes referred to as sales conversations) can take place over multiple sales calls before a purchase decision is made.

2. Explain why organized sales dialogues and presentations are more frequently used than canned presentations or written sales proposals. Although canned presentations and written sales proposals are effective in some situations, most business-to-business sales calls involve sales dialogue. An organized sales presentation is a form of sales dialogue in which the buyer is an active participant. Most business buyers want to be actively involved in the dialogue, which allows a full exploration of the buyer's needs, requirements, and preferences. Because the organized dialogue is tailored to each customer, it is more effective in more situations than a generic approach such as a canned presentation.

3. Discuss the nine components in the planning template for an organized sale dialogue or presentation. The Sales Dialogue and Presentation Template consists of nine sections: (1) prospect information; (2) customer value proposition; (3) sales call objective; (4) situation and needs analysis—linking buying motives, benefits, support information, and other reinforcement methods; (5) competitive situation; (6) beginning the sales dialogue; (7) anticipate questions and objections; (8) earn prospect commitment; and (9) building value through follow-up action.

4. Explain how to write a customer value proposition statement. A customer value statement should be simple, so that it provides a clear direction for upcoming sales dialogues. Salespeople should not attempt to include all of their benefits in a value proposition statement—rather, they should choose the key benefit(s) that are likely to be most important to the specific customer. The value proposition should be as specific as possible, on listing tangible outcomes such as

revenue improvement, cost containment or reduction gain in market share, process speed and efficiency, or the enhancement of a customer's strategic priority. Value proposition statements should promise only what can be consistently delivered. Strictly speaking, a customer value proposition in the planning stage is not a guarantee, it is a belief based on the salesperson's knowledge and best judgment. As the sales process moves along, appropriate guarantees can be made.

5. Link buying motives to benefits of the seller's offering, support claims made for benefits, and reinforce verbal claims made. Organized sales dialogues and presentations should focus on the most important motives for a given buyer. Benefits must be linked to both rational and emotional motives, and supporting information must be given for each claim made of a benefit. In some cases, the claim needs support beyond the spoken word (for example, through audio-visual content, printed collateral material, third-party research studies, or testimonials from satisfied customers).

6. Engage the customer by setting appointments. Salespeople customarily set an appointment, at least for their initial sales calls on new prospects. Appointments may be arranged by telephone, e-mail, or a combination of phone and mail and should include a request for a specific time and date as well as the amount of time being requested for the sales call. Salespeople have a better chance of securing an appointment if they are prepared to give the customer a good reason for spending time with them.

Examination

Multiple Choice

1. Which of the following is NOT a characteristic of canned sales presentations?

- a) Scripted sales calls
- b) Tailored to prospect's needs
- c) Logically structured
- d) Tested with real customers before use

2. Why are organized sales dialogues and presentations preferred over canned presentations or written sales proposals?

- a) They require less preparation time
- b) They allow for maximum input and feedback from the prospect
- c) They are more cost-effective
- d) They are standardized and applicable to all situations

3. What are the nine components in the planning template for an organized sales dialogue or presentation?

- a) Eight sections
- b) Ten sections
- c) Nine sections
- d) Seven sections

4. What should a customer value proposition statement focus on?

- a) Including all benefits of the product
- b) Making vague promises to the customer
- c) Providing a clear direction for upcoming sales dialogues
- d) Avoiding specific outcomes

5. How should benefits be presented in organized sales dialogues and presentations?

- a) Linked only to rational motives
- b) Without any supporting information
- c) Linked to both rational and emotional motives, with supporting information
- d) Without any connection to buyer motives

6. How can salespeople effectively engage customers to set appointments?

- a) Without providing a reason for the appointment
- b) By being unprepared for the sales call
- c) By requesting a specific time and date for the appointment and providing a good reason for spending time with them
- d) By leaving the appointment scheduling entirely up to the customer

Sure, here are some additional questions for the quiz:

7. What is a key characteristic of a written sales proposal?

- a) It is tailored to each individual prospect
- b) It is prepared before any assessment of the buyer's situation
- c) It is not self-contained
- d) It does not require any prior testing with real customers

8. What is the primary purpose of anticipating questions and objections in a sales dialogue?

- a) To avoid addressing any concerns the prospect may have
- b) To be caught off guard during the presentation
- c) To prepare appropriate responses in advance
- d) To skip over any objections raised by the prospect

9. Which of the following is NOT a tangible outcome that may be included in a customer value proposition statement?

- a) Revenue improvement
- b) Increased brand awareness
- c) Cost containment or reduction
- d) Gain in market share

10. How can salespeople reinforce verbal claims made during a sales dialogue?

- a) By ignoring any objections raised by the prospect

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- b) By providing vague responses to questions
- c) By offering supporting information such as testimonials or research studies
- d) By avoiding any mention of benefits altogether

11. What is the significance of setting appointments in the sales process?

- a) It is unnecessary and can be skipped entirely
- b) It allows salespeople to make unexpected visits to prospects
- c) It provides a structured time for sales discussions and ensures the prospect's availability
- d) It is only applicable in business-to-consumer (B2C) sales scenarios

12. In what way do organized sales dialogues differ from canned presentations?

- a) They are less flexible and tailored to the prospect's needs
- b) They are more standardized and generic in approach
- c) They allow for maximum input and feedback from the prospect
- d) They do not require any preparation or planning beforehand

Answers:

1. b) Tailored to prospect's needs
2. b) They allow for maximum input and feedback from the prospect
3. c) Nine sections
4. c) Providing a clear direction for upcoming sales dialogues
5. c) Linked to both rational and emotional motives, with supporting information
6. c) By requesting a specific time and date for the appointment and providing a good reason for spending time with them
7. d) It does not require any prior testing with real customers
8. c) To prepare appropriate responses in advance
9. b) Increased brand awareness
10. c) By offering supporting information such as testimonials or research studies
11. c) It provides a structured time for sales discussions and ensures the prospect's availability
12. c) They allow for maximum input and feedback from the prospect

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