

Four Levels of Selling Checklist

Identify your relationship level at each of the 7-Steps. Then, level up

PROFESSIONAL
DEVELOPMENT



		1 Commercial Visitor	2 Product Peddler	3 Consultative Seller	4 Sustaining Resource
Prospecting	▶	"Just checking in" "Stopping by" "Limited territory - "The Good Ole Boys"	Prepared packages to meet sales goals	Finding qualified prospects to solve problems and increase business	Find additional departments to solve problems for greater share
Appointments	▶	Route system - Same accounts consistently - rarely any new business efforts	Credibility based on product knowledge and expertise	Credibility based on empathy, expertise, problem-solving skills	Perceived as unpaid member of staff. Part of the internal Problem Preventers
Research	▶	Call reports for sales manager: Dials, contacts, conversions, call reports	Planned work focused on closing the sale - Heavy management pressure on activity	Source of Business Advantage. Information relevant and significant to client	Customer requests are for business help and advice more than for the product
CNA	▶	Make the buyer like me - Measures activity not results	Being a product expert "Do you need any?"	Open-ended questions - Objective identify the customer's needs from customer's point of view	Being an "insider" and problem preventer
Proposal	▶	Memorized script presentation - off the shelf solutions"	Feature/benefit analysis, point by point review of product	Research clients current position, competitors, industry information	Research based - customer focused. Contains "insider" information
Presentation	▶	Verbal only or pre-packaged - presented to buyer	Low level stakeholders in addition to buyer - Heavy selling-tool usage	Customized presentation based on needs presented to Mid-level management	Connected to all levels of company management/stakeholders - true "insider"
Close	▶	Become friends - close personal relationship, gifts, social activities	Product literature customized to solve identified problem	Systems and solutions that may include resources outside your company - Team selling	Profit driven to improve return on investment - profit hero
Attitude	▶	"I like you - You like me, let's do business together	I remember when working for this company was fun but if that's what they want	Being of sincere value to clients - help their business achieve objectives	Being a sustaining resource to client. Know the customer's business as well my own