



In-Person Sales

GLOBAL COURSEWARE

Getting Started

You never know when or where you will meet your next customer, and it is important to make a good impression.

Anyone who is interested in sales must be confident in the art of in-person sales.

Workshop Objectives



- Understand in-person sales
- Explain the sales funnel
- Explore sales techniques
- Develop loyalty
- Identify ways to build customer base



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*You don't close a sale, you open a relationship if you want to
build a long-term, successful enterprise.*

Patricia Fripp

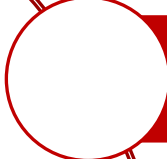
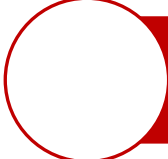
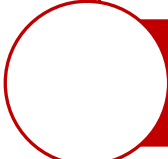
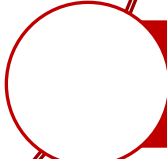
MODULE TWO

In-Person Sales

Understanding the definition of in-person sales as well as their benefits, costs, and effectiveness will help improve interaction and sales.



Definition

-  Sales Calls
-  Face Time
-  Meetings
-  Retail Settings

Benefits

- Build Trust
- Demonstrate Product
- Easier Close
- Generate Referrals





Cost

No matter the method used, a specialized sales force that connects with individual customers will have the highest cost.

Effectiveness

Face-to-face interactions distinguish sales people, which increases their success.



Practical Illustration



- Definition
- Benefits
- Cost
- Effectiveness

Module Two: Review Questions

1. What is the traditional in-person sales?

A. Individual

B. None

C. Offsite

D. Face-to-face

Module Two: Review Questions

2. What has changed in-person selling?

A. Nothing

B. Activities

C. Assessments

D. Technology

Module Two: Review Questions

3. What is the main benefit of in-person sales?

A. Demonstrate product

B. Relationships

C. Close

D. Unknown

Module Two: Review Questions

4. Who benefits from in-person sales?

A. Company

B. Unknown

C. Sales person

D. A & C

Module Two: Review Questions

5. What has the highest cost?

A. Retail

B. Specialized sales force

C. Conversion

D. All of the above

Module Two: Review Questions

6. What determines the cost of in-person sales?

A. Methods

B. Face Time

C. Overhead

D. None of the above

Module Two: Review Questions

7. What is the most effective sales technique?

A. Online

B. Specialized

C. Print

D. All of the above

Module Two: Review Questions

8. How many in-person meetings do most customers average in a week?

A. 4.6

B. 1.8

C. 2.7

D. None

Module Two: Review Questions

9. Direct sales help you to connect with _____ and move them through the sales process.

A. Sales people

B. Customers

C. Investors

D. None of the above

Module Two: Review Questions

10. In-person sales occur when you are working directly with the client at a/an _____ level.

A. Impersonal

B. Sales

C. Advertising

D. Individual



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Make a customer, not a sale.

Katherine Barchetti

MODULE THREE

Examples of In-Person Sales

Knowledge of how sales calls, retail, meetings, and FaceTime operate is essential to the success of anyone interested in in-person sales.



Sales Call

Meet with the decision maker

Find relevant information

Get a follow-up appointment

Retail

- Find an accessible location
- Choose the method of payment
- Keep the sales area clean and presentable





FaceTime

Look professional

Listen actively

Monitor body
language

Meetings

- Confirm
- Set up
- Practice
- Review past conversations



Practical Illustration



- Sales Call
- Retail
- FaceTime
- Meetings

Module Three: Review Questions

1. What is the equivalent of the in-person sales call?

A. Marketing

B. Sales funnel

C. B2B

D. Cold call

Module Three: Review Questions

2. What should be done before leaving a sales call?

A. Respond

B. Find information

C. Set appointment

D. Identify decision maker

Module Three: Review Questions

3. What requires extra set up and break down?

A. Booth

B. Popup

C. None

D. A & B

Module Three: Review Questions

4. What is necessary for all retail spaces?

A. One employee

B. Employee training

C. Multiple employees

D. Unknown

Module Three: Review Questions

5. What is not typically used in the first meeting?

A. Face Time

B. Skype

C. A & B

D. None of the above

Module Three: Review Questions

6. What techniques are used with Face Time?

A. Same as on the phone

B. Same as in-person

C. Same as email

D. None of the above

Module Three: Review Questions

7. How should communication be in meetings?

A. One-sided

B. Two-sided

C. Simple

D. Open

Module Three: Review Questions

8. What is necessary when the customer does not purchase at a meeting?

A. Review value

B. Creativity

C. Nothing

D. Schedule a follow-up

Module Three: Review Questions

9. Before anyone can master in-person sales, it is necessary to be familiar with the different _____.

A. Examples

B. People

C. A and B

D. None of the above

Module Three: Review Questions

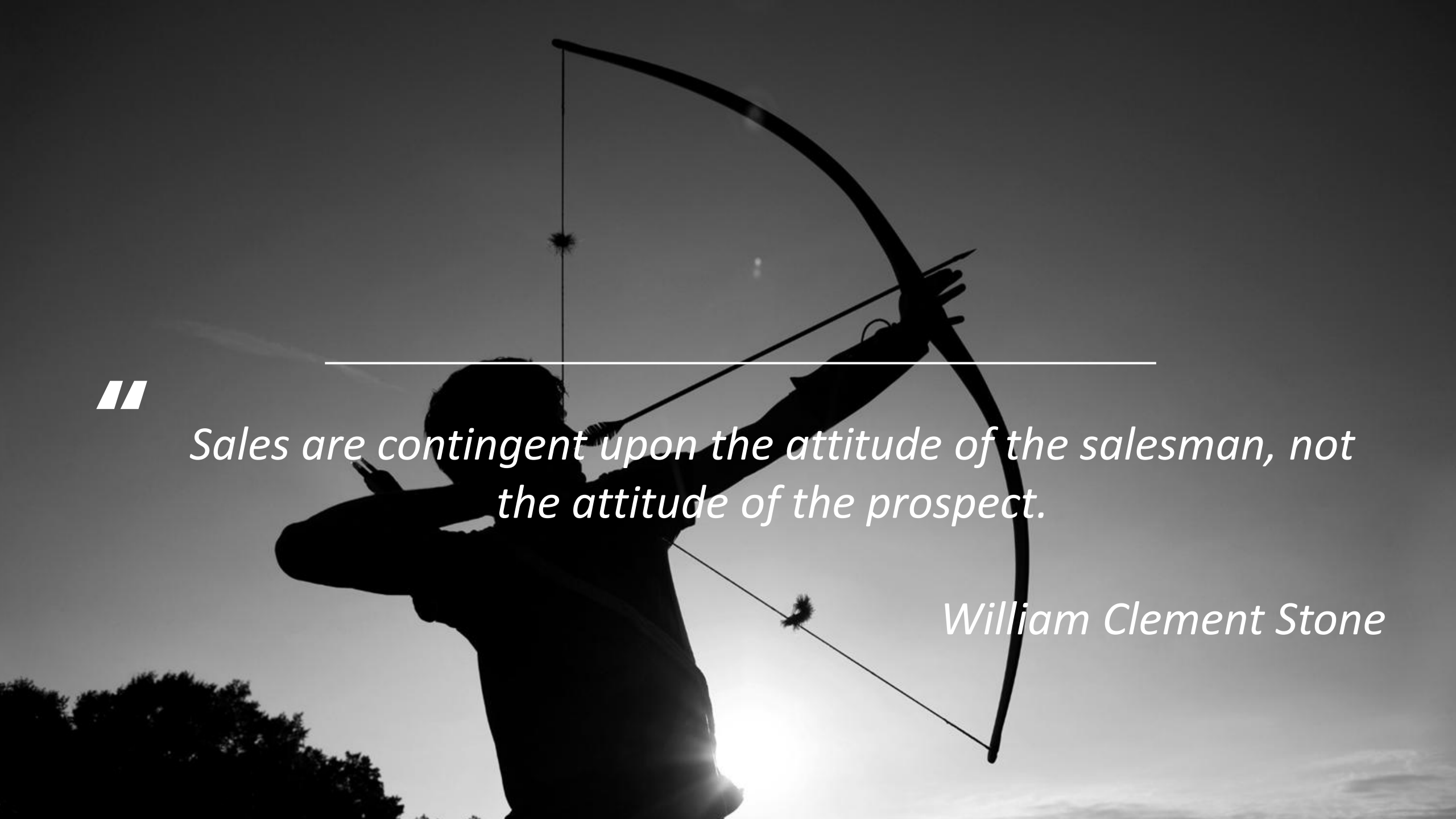
10. What is your best chance to make a good impression?

A. Meeting for lunch

B. Having a good sales pitch

C. Dress well

D. Sales call



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*Sales are contingent upon the attitude of the salesman, not
the attitude of the prospect.*

William Clement Stone

MODULE FOUR

Sales Funnel

The sales funnel has the following stages: generating leads, nurturing leads, acquiring a customer base, and expanding the customer base.



Generate Leads



Nurture Leads

- Classes
- Content
- Newsletters
- Demonstrations





Acquire Customer Base

Appeal to their values

Offer incentives

Demonstrate expertise

Expand Customer Base

- White papers
- Dialogue
- Mentorship
- Meetings



Practical Illustration



- Generate Leads
- Nurture Leads
- Acquire Customer Base
- Expand Customer Base

Module Four: Review Questions

1. Where do leads come from?

A. Marketing

B. Prospects

C. Interpersonal relationships

D. A & C

Module Four: Review Questions

2. What will help monitor leads?

A. Cataloguing

B. Follow-up

C. Emails

D. All of the above

Module Four: Review Questions

3. How many contacts does it take for some customers to purchase?

A. 3

B. 1

C. 10

D. 5

Module Four: Review Questions

4. What would be an effective follow-up for a sales call?

A. Phone call

B. Email

C. Meeting

D. All of the above

Module Four: Review Questions

5. What precedes acquisition?

A. Commitment

B. Purchase

C. Engagement

D. None of the above

Module Four: Review Questions

6. What is likely to happen when a customer has to think about buying?

A. Nothing

B. Purchase

C. Engagement

D. Commitment

Module Four: Review Questions

7. What will draw interest?

A. Leads

B. Goals

C. Sales

D. Customer experience

Module Four: Review Questions

8. What determines which techniques to use?

A. Target customer

B. Company

C. A & B

D. None of the above

Module Four: Review Questions

9. The sales funnel is the _____ of any sales technique.

A. Guarantee

B. Follow-up

C. End result

D. Foundation

Module Four: Review Questions

10. Which of the following are stages of the sales funnel?

A. Generating leads

B. Nurturing leads

C. Acquiring a customer base

D. All of the above



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Every choice you make has an end result.

Zig Ziglar

MODULE FIVE

Prepare

In-person sales take even more preparation because you are communicating in the moment.



Effective Methods to Generate Leads

Q&A



Consultations



Partnerships

Know Your Customer

- Age
- Gender
- Median Income
- Location





Practice Sales Conversation

When you determine the conversion rate, evaluate the numbers to determine what changes need to be made.

Set Goals

- How often do you follow up with leads?
- How often do you provide service after the sale?



Practical Illustration



- Effective Methods to Generate Leads
- Know Your Customer
- Practice Sales Conversation
- Set Goals

Module Five: Review Questions

1. What is the best source of lead generation?

A. Sales

B. Commitment

C. Referrals

D. None of the above

Module Five: Review Questions

2. What will incentives do?

A. Acquire leads

B. Generate leads

C. A & B

D. None of the above

Module Five: Review Questions

3. What should you do if your company and lead do not share values?

A. Make a sales call

B. Attempt to change the customer

C. A & B

D. Nothing

Module Five: Review Questions

4. What is the best way to know the customer?

A. Demographics

B. Networking

C. Conversion

D. Acquire leads

Module Five: Review Questions

5. How long of a wait will decrease the chance of conversion?

A. 24 hours

B. 48 hours

C. 72 hours

D. All of the above

Module Five: Review Questions

6. When are there opportunities for conversion?

A. Each interaction

B. First meeting

C. Conference call

D. None of the above

Module Five: Review Questions

7. What is true of all sales goals?

A. They focus on finances

B. Nothing

C. They need to be SMART

D. They customer focused

Module Five: Review Questions

8. What is NOT part of the SMART goal?

A. Specific

B. Measurable

C. Achievable

D. Related

Module Five: Review Questions

9. When moving through the sales leads, it is important to _____.

A. Prepare carefully

B. Plan for the worst

C. Hope for the best

D. Rely on others for input

Module Five: Review Questions

10. In-person sales take even more preparation because you are _____ in the moment.

A. Thinking

B. Communicating

C. Writing

D. None of the above



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If you are not taking care of your customer, your competitor will.

Bob Hooey

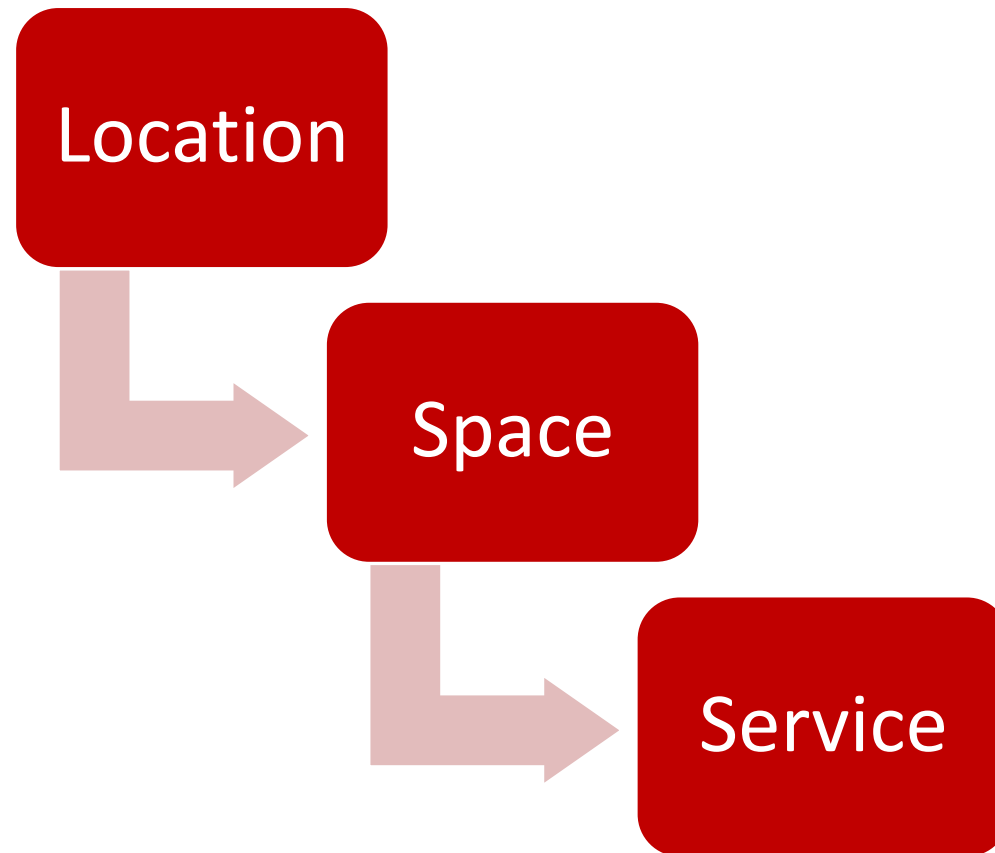
MODULE SIX

Presentation

Always remember to stay on point, connect with customer values, and consider previous discussions.



Determine Venue



Stay on Point

- Information
- Stories / Examples
- Visual support





Tie the Information to Customer Values

Evidence such as customer comments or trials will help convince customers that you speak to their values and will provide for their needs.

Refer to Past Conversations

Stay focused on the main needs in your presentation, but be prepared to address any questions that may arise.



Practical Illustration



- Determine Venue
- Stay on Point
- Tie the Information to Customer Values
- Refer to Past Conversations

Module Six: Review Questions

1. What determines which venue you choose?

A. Company

B. Meeting

C. Information

D. All of the above

Module Six: Review Questions

2. What needs to be considered when choosing the space?

A. Size

B. Layout

C. Equipment

D. All of the above

Module Six: Review Questions

3. What is true of data?

A. It must be current

B. It must be complex

C. It must be accurate

D. A & C

Module Six: Review Questions

4. What gets the attention of the audience?

A. First line

B. Images

C. A & B

D. None of the above

Module Six: Review Questions

5. What will help convince customers that you reflect their values?

A. Evidence

B. Presentation

C. Goals

D. Information

Module Six: Review Questions

6. What is evidence?

A. Trials

B. Customer comments

C. A & B

D. None of the above

Module Six: Review Questions

7. What should you recap?

A. Questions

B. Values

C. Cost

D. Customer needs

Module Six: Review Questions

8. What should be done when addressing past conversations?

A. Point out standards

B. Nothing

C. Address values

D. Highlight solutions

Module Six: Review Questions

9. The in-person presentation is where you must _____.

A. Make hay while the sun shines

B. Show 'em who's boss

C. Put your best foot forward

D. All of the above

Module Six: Review Questions

10. Always remember to ____.

A. Stay on point

B. Connect with customer values

C. Consider previous discussions

D. All of the above



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*Sales are contingent upon the attitude of the salesman, not
the attitude of the prospect.*

William Clement Stone

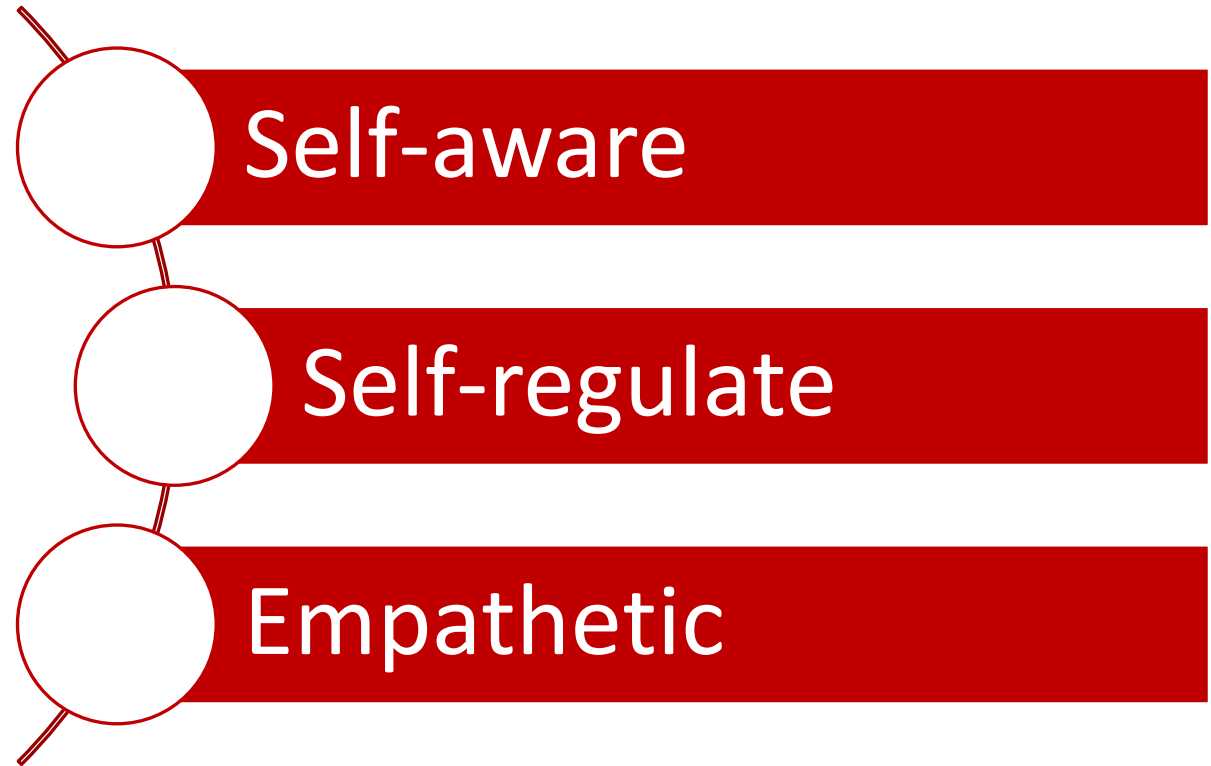
MODULE SEVEN

Engage

In order to engage and create new customers, salespeople must have an understanding of emotional intelligence.



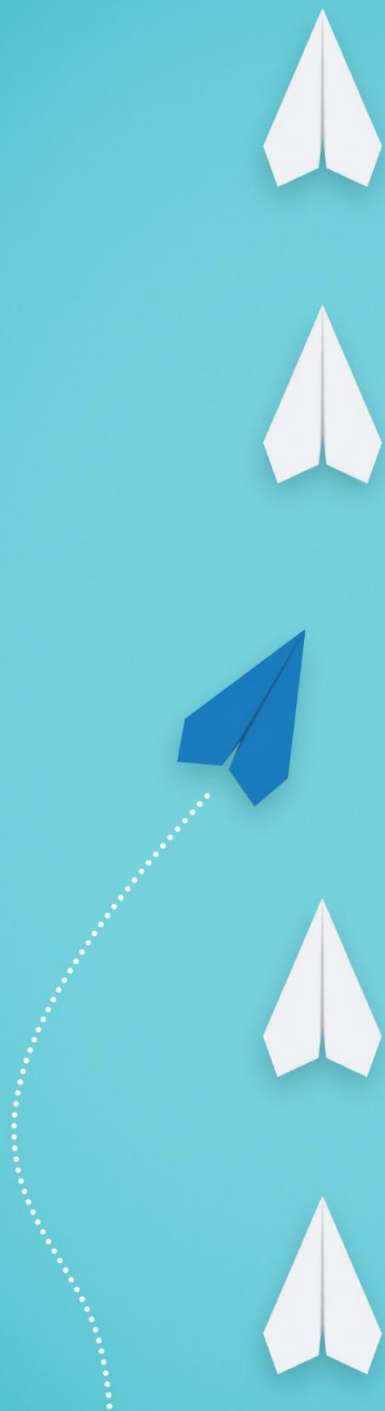
Emotional Intelligence



Allow Evaluation

Potential customers must be allowed to evaluate information and weigh their options.





Overcome Objections

We use the
competition

We do not
have time

Lack of
funds

Incentives

- Free items
- Reduced prices, rebates, etc.
- Bonus
- Upgrades



Practical Illustration



- Emotional Intelligence
- Allow Evaluation
- Overcome Objections
- Incentives

Module Seven: Review Questions

1. What are emotionally intelligent people aware of?

A. Their emotions

B. I.Q.

C. Emotions of others

D. A & C

Module Seven: Review Questions

2. What do emotionally intelligent people Not base their actions on?

A. Communication

B. Feelings

C. Values

D. All of the above

Module Seven: Review Questions

3. What is one of the worst mistakes someone can make in sales?

A. Guide gently

B. Press too hard

C. Valuing

D. Being creative

Module Seven: Review Questions

4. What can you compare for customers?

A. Your products

B. Your product and the competition's

C. A & B

D. Nothing

Module Seven: Review Questions

5. What is the most common objection?

A. Cold shoulder

B. Lack of funds

C. Competition

D. Time

Module Seven: Review Questions

6. What is the best way to handle to the most common objection?

A. Demonstrate value

B. Varies

C. Be understanding

D. Ask for 30 seconds

Module Seven: Review Questions

7. What is the point of incentives?

A. Personal interest

B. Social skills

C. Emotional intelligence

D. Inspire commitment

Module Seven: Review Questions

8. What determines incentive?

A. Individual business

B. Interest

C. Customer base

D. A & C

Module Seven: Review Questions

9. In order to engage and create new customers, salespeople must have an understanding of _____.

A. Emotional Intelligence

B. A customer's ability to purchase

C. The latest trends in sales

D. None of the above

Module Seven: Review Questions

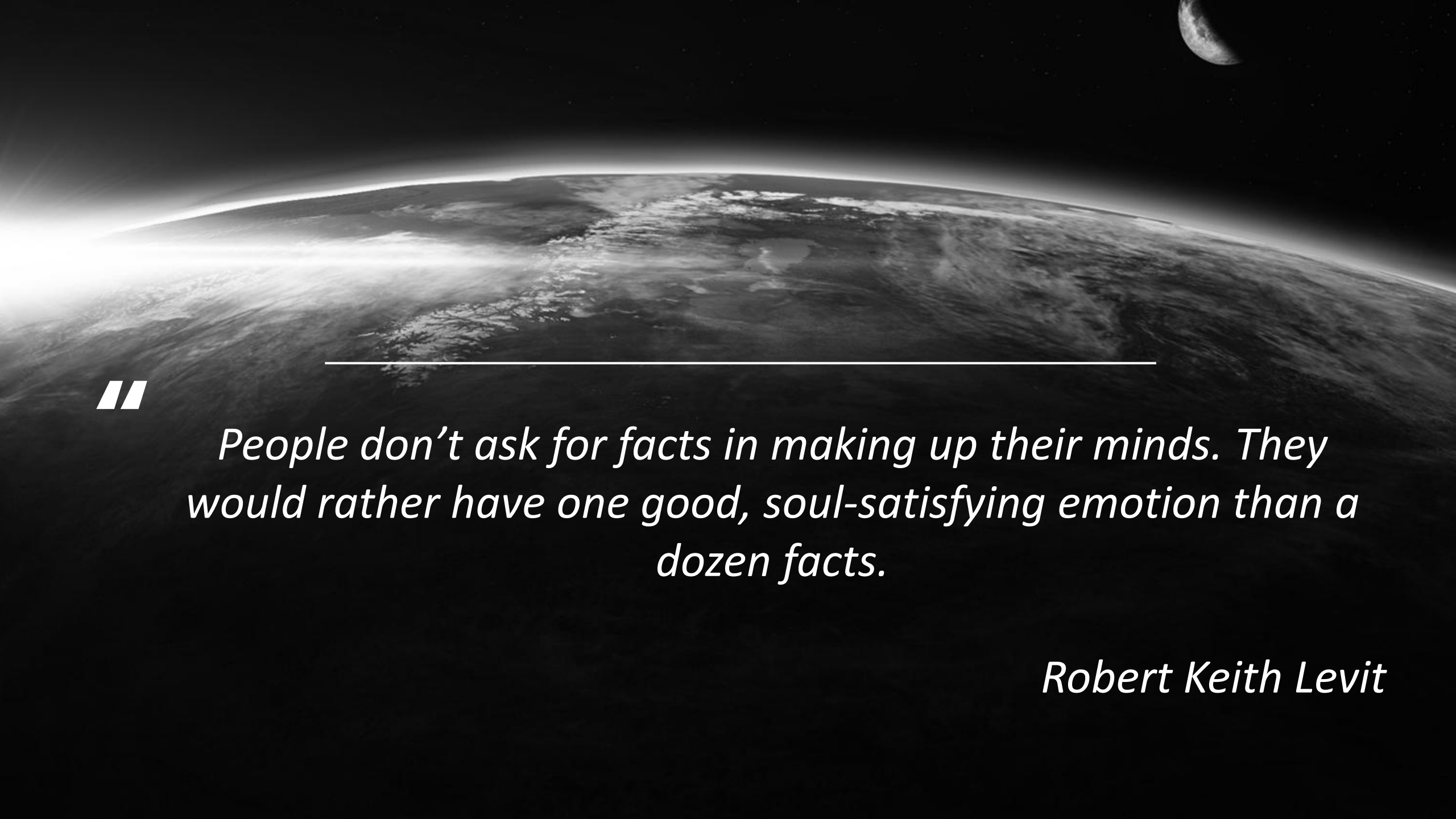
10. Which of the following are traits of an Emotionally Intelligent person?

A. Empathetic

B. Healthy

C. Motivated

D. A and C



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People don't ask for facts in making up their minds. They would rather have one good, soul-satisfying emotion than a dozen facts.

Robert Keith Levitt

MODULE EIGHT

Commitment

The commitment phase of the sales process is highly delicate. It is important to understand how to move people from a verbal commitment to the actual sale.



A Verbal “Yes”

The prospect gets
busy and
sidetracked

The competition
tries to undercut
your deal

The salesperson
gets sidetracked
and fails to follow-
up

Maintain Connection

- Contact people when you say you will.
- Connect with all people involved in the process.



A wooden ladder is leaning against a green chalkboard. A large white arrow is drawn on the chalkboard, pointing upwards and to the right. The ladder is positioned as if it is reaching towards the tip of the arrow.

Remind Customer of Value

- Compare price with the competition.
- Remind customer about shared personal and professional values.
- Bring up incentives.

Call to Action

- Offer extras for immediate actions
- Limit choices
- Stand out



Practical Illustration



- A Verbal “Yes”
- Maintain Connection
- Remind Customer of Value
- Call to Action

Module Eight: Review Questions

1. What does the verbal “yes” imply?

A. End of sale

B. Commitment

C. Intention

D. None of the above

Module Eight: Review Questions

2. What must be maintained after receiving the “yes”?

A. Responsibility

B. Nothing

C. Promises

D. Connection

Module Eight: Review Questions

3. What will help monitor clients?

A. Follow-up

B. Meetings

C. CRM system

D. Nothing

Module Eight: Review Questions

4. What is necessary to deliver?

A. Connection

B. Communication

C. Independence

D. Promises

Module Eight: Review Questions

5. What do customers need to be reminded of?

A. Facts

B. Value

C. Nothing

D. Emotions

Module Eight: Review Questions

6. What determines what you share with customers?

A. Company

B. Level of relationship

C. Commitment

D. All of the above

Module Eight: Review Questions

7. What is a call to action?

A. Online tool

B. Engagement

C. Commitment

D. Opportunity to buy

Module Eight: Review Questions

8. What motivates customers?

A. Scarcity

B. Nothing

C. Actions

D. Limited choices

Module Eight: Review Questions

9. The _____ phase of the sales process is highly delicate.

A. Busiest

B. Final

C. Initial

D. Commitment

Module Eight: Review Questions

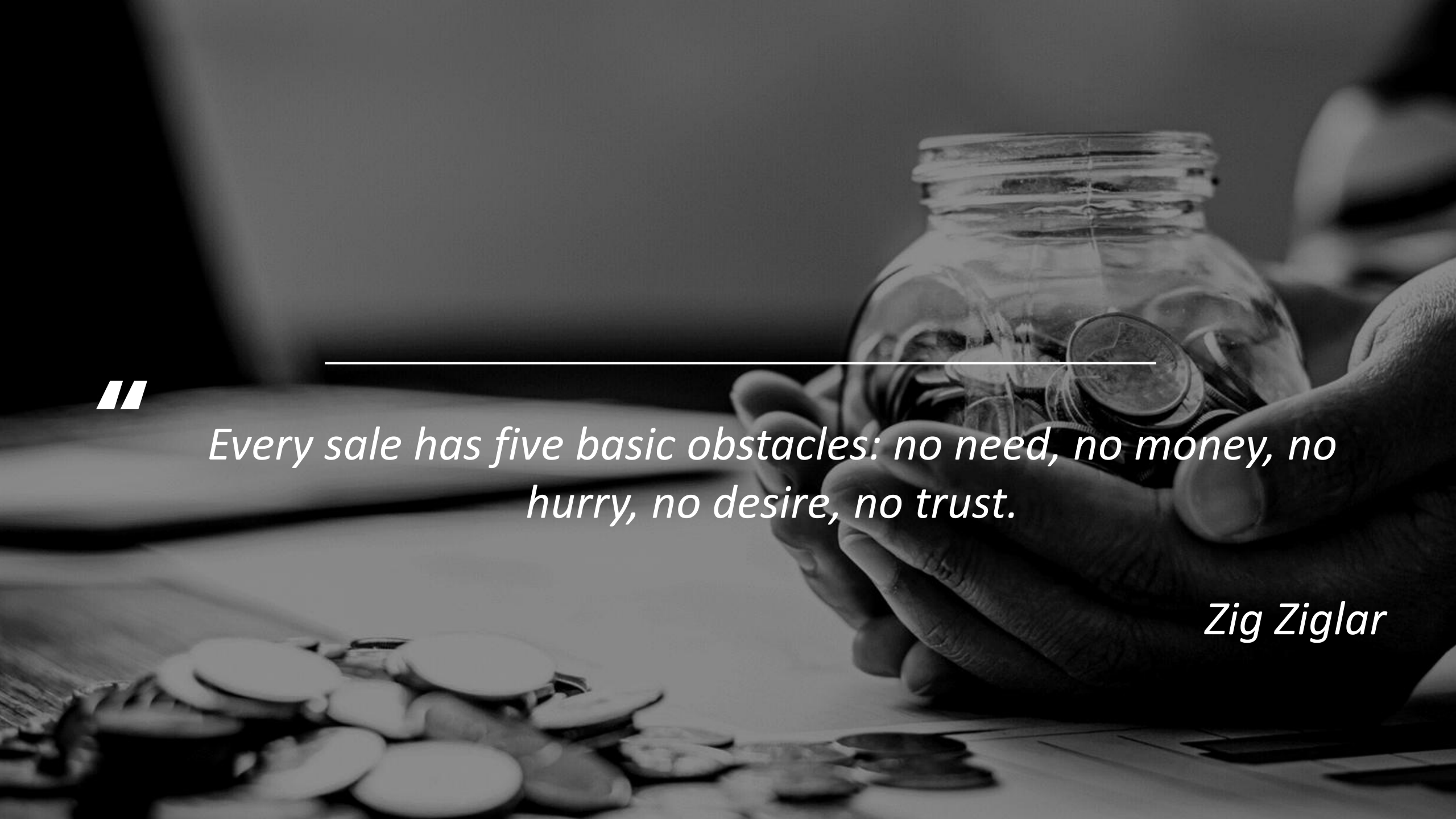
10. How can you move people from a verbal commitment to the actual sale?

A. Maintain connections

B. Remind customers of values

C. Calls to action

D. All of the above



“

Every sale has five basic obstacles: no need, no money, no hurry, no desire, no trust.

Zig Ziglar

MODULE NINE

Sale

The final sale is the goal of every sales relationship. At this stage, it is important to stay calm and focused.



It Isn't Over Till It's Over

Learn from what customers say, and it will be easier to turn rejection into a sale.

Make the Process Easy

- Payment methods accepted
- Packaging
- Automatic payments for repeat orders





Close With Exceptional Service

Offer to be
available for
any questions
or support

Communicate
sincerely by
building on
past
interactions

Ask if the
customer has
any other
needs

Thank and Reward

Remember to be sincere in your gratitude and share how you look forward to meeting again in the future.



Practical Illustration



- It Isn't Over Till It's Over
- Make the Process Easy
- Close With Exceptional Service
- Thank and Reward

Module Nine: Review Questions

1. What should be done when the customer says no?

A. Make other offers

B. Do not follow up

C. Leave

D. Find out why

Module Nine: Review Questions

2. What should sales people learn from?

A. ROI

B. Unknown

C. What customers say

D. Cost

Module Nine: Review Questions

3. What should be examined?

A. Simplicity

B. Barriers

C. Goal

D. None of the above

Module Nine: Review Questions

4. What is necessary after examining the business?

A. Comparison

B. Discover

C. Simplify

D. Unknown

Module Nine: Review Questions

5. What must continue at close?

A. Relationship building

B. Selling

C. Upsells

D. Guarantees

Module Nine: Review Questions

6. What should be provided at the close of a sale besides service?

A. Nothing

B. Money

C. Contract

D. Valuable product

Module Nine: Review Questions

7. What should occur at the end of the sale?

A. Letters

B. Form letter

C. Goals

D. Positive memory

Module Nine: Review Questions

8. What would be considered a reward?

A. Thank-you card

B. Follow-up

C. Discount

D. All of the above

Module Nine: Review Questions

9. The _____ is the goal of every sales relationship.

A. Amount of money you make

B. The relationships you build

C. Final Sale

D. Reward

Module Nine: Review Questions

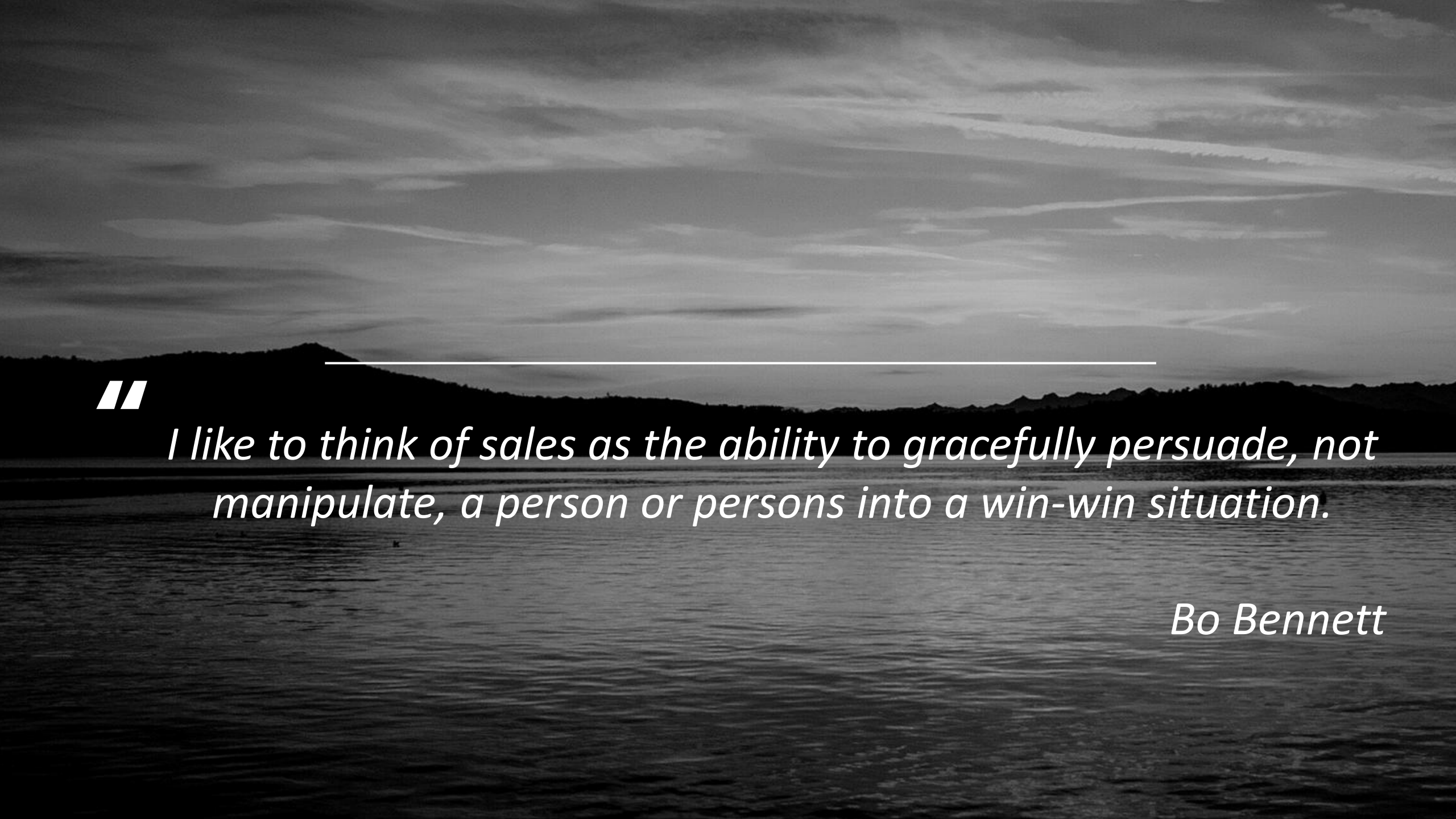
10. To make the process as easy as possible, you should_____.

A. Find an easier customer to deal with

B. Sell more

C. Use another product

D. Provide exceptional service



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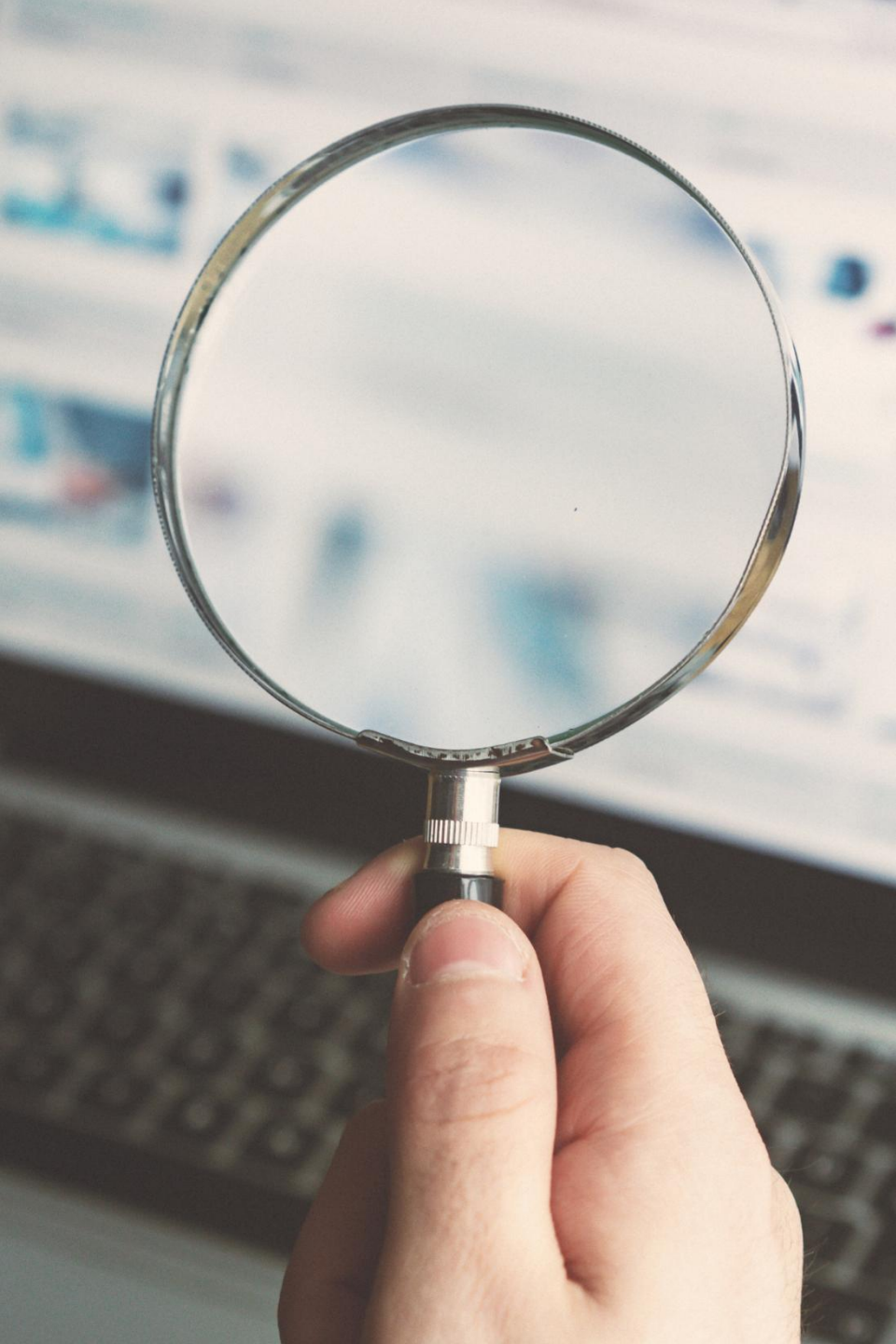
I like to think of sales as the ability to gracefully persuade, not manipulate, a person or persons into a win-win situation.

Bo Bennett

MODULE TEN

Loyalty

Finds ways to remain relevant to your customers, and maintain a personal connection using hand written cards.



Continuity Programs

Retainer

Perpetual

Association

Special Rewards

- Point
- Tier
- Fee





Handwritten Cards

- Choose cards that reflect the company.
- Personalize the cards using customer notes.
- Make it relevant

Remain Relevant

- Monitor changes to society
- Pay attention to changes in the market
- Listen to customers and employees



Practical Illustration



- Continuity Programs
- Special Rewards
- Handwritten Cards
- Remain Relevant

Module Ten: Review Questions

1. What incentives to companies provide continuity programs?

A. Information

B. Respect

C. Free trials

D. All of the above

Module Ten: Review Questions

2. What program lasts for a predetermined amount of time?

A. Association

B. Club

C. Retainer

D. Micro

Module Ten: Review Questions

3. What do rewards encourage?

A. Nothing

B. Loyalty

C. Evaluation

D. Commitment

Module Ten: Review Questions

4. What is the basic method of customer rewards?

A. Point

B. Tier

C. Fee

D. None of the above

Module Ten: Review Questions

5. What do cards represent?

A. Waste

B. Out-dated ideas

C. Thoughtfulness

D. None of the above

Module Ten: Review Questions

6. When can cards be used?

A. Follow-up

B. Special offers

C. Birthdays

D. All of the above

Module Ten: Review Questions

7. By remaining relevant, a company will inspire what?

A. Values

B. Interest

C. Loyalty

D. Brand

Module Ten: Review Questions

8. What changes relevance?

A. Needs

B. Values

C. Technology

D. All of the above

Module Ten: Review Questions

9. Never underestimate the significance of _____.

A. Lots of sales

B. Earning a good income

C. Customer loyalty

D. Taking vacation

Module Ten: Review Questions

10. What is the best advertisement you can find?

A. Park benches

B. Repeat customers

C. Billboards

D. Social media



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The best sales questions have your expertise wrapped into them.

Jill Konrath

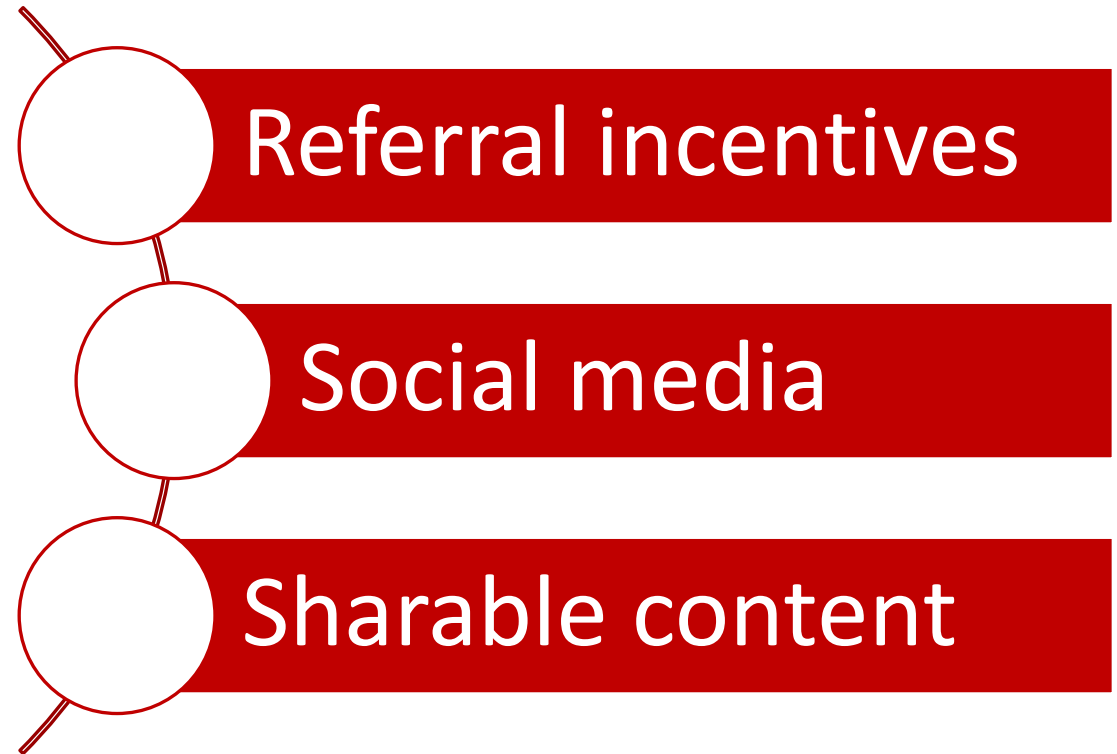
MODULE ELEVEN

Expand

Using tactics such as word of mouth, networking, and meetings, will help improve your chances of growing your company.



Word of Mouth



Networking

- Be open-minded and do not dismiss anyone.
- Make connections that are reciprocal relationships.
- Be sincere.





Meetings

Meetings are typically structured events, but they still offer opportunities to socialize and find new customers.

Clubs

Clubs are useful social organizations where people with similar interests gather together.



Practical Illustration



- Word of Mouth
- Networking
- Meetings
- Clubs

Module Eleven: Review Questions

1. What damages networking?

A. Too much effort

B. Nothing

C. Failing to believe in it

D. None of the above

Module Eleven: Review Questions

2. What is a specific prepared communication used to network?

A. Nothing

B. Dialogue

C. Active listening

D. Elevator pitch

Module Eleven: Review Questions

3. What is the best method of advertising?

A. None

B. Print

C. Social media

D. Word of mouth

Module Eleven: Review Questions

4. What is the best way to foster word of mouth advertising?

A. Satisfy customers

B. Print media

C. Media

D. Creative outlets

Module Eleven: Review Questions

5. What is true of meetings?

A. They are open

B. They are structured

C. Anyone can attend

D. None of the above

Module Eleven: Review Questions

6. When should you network at a meeting?

A. Before meeting

B. At break

C. After meeting

D. All of the above

Module Eleven: Review Questions

7. What do clubs provide?

A. Learning

B. Showcase abilities

C. A & B

D. None of the above

Module Eleven: Review Questions

8. Setting yourself up as _____ attracts customers.

A. Interested

B. Sales person

C. Expert

D. None of the above

Module Eleven: Review Questions

9. _____ will serve to expand the number of customers you have.

A. Customer loyalty

B. Connections

C. A and B

D. None of the above

Module Eleven: Review Questions

10. Using tactics such as _____, will help improve your chances of growing your company.

A. Word of mouth

B. Networking

C. Meetings

D. All of the above

MODULE TWELVE

Wrapping Up

Although this workshop is coming to a close, we hope that your journey to learning about In-Person Sales is just beginning.



Words From the Wise

Pretend that every single person you meet has a sign around his or her neck that says, 'Make me feel important.' Not only will you succeed in sales, you will succeed in life.

- Mary Kay Ash

Nobody counts the number of ads you run; they just remember the impression you make.

- William Bernbach

The secret of man's success resides in his insight into the moods of people, and his tact in dealing with them.

- J.G. Holland