

January 2024

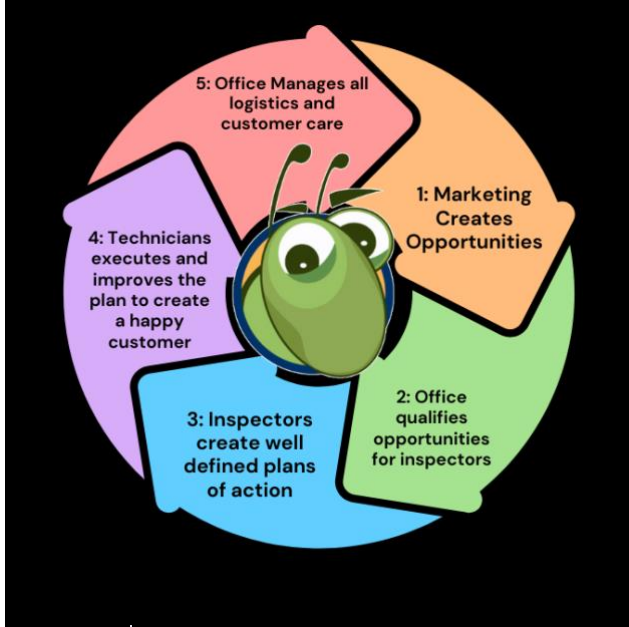


INSPECTOR PLAY BOOK

Customer service philosophy

Provide our customers with exceptional service by exceeding their expectations of quality, professionalism and cleanliness at the property. Extend that relationship year after year through consistently working to impress them, their friends and family.

Customer service is the sum total of the experience the customer has while in contact with any of our literature, vehicles or team members. Everything we do is either improving or harming customer service



Creating an interdependent culture at HALO Home Services is crucial for building a healthy company and fostering customer satisfaction. The outlined "Cycle" illustrates the seamless flow of responsibilities, highlighting the significance of each department's role. Let's break down the key steps:

1. Marketing - Generating Opportunities:

- Initiates the cycle by creating opportunities for the company.
- Sets the foundation for customer engagement and growth.

2. Customer Service - Qualifying Opportunities:

- Plays a vital role in maintaining the cycle by ensuring that opportunities meet the company's standards.
- Acts as a gatekeeper, filtering and

qualifying potential business.

3. Inspection - Detailed Planning and Expectations:

- Conducts meticulous inspections, outlining clear plans of action.
- Sets proper expectations, laying the groundwork for successful execution.

4. Technician - Executing Plans and Ensuring Satisfaction:

- Executes the plan of action with a focus on excellence.
- Strives for continuous improvement, enhancing customer service and professionalism.
- Hands back a satisfied customer to the office, completing the cycle.

Inter-Departmental Dependence:

- Emphasizes the interconnectedness of departments.
- Any break in the cycle impacts everyone, underlining the importance of each team's contribution.
- Identifying individuals not maintaining their part of the cycle is crucial for the company's future.

Cultural Aspect:

- Promotes a culture of accountability and excellence.
- Encourages teamwork and mutual reliance for the success of HALO Home Services.
- Substandard cycle maintenance is recognized as detrimental to the company's future.

In summary, the success of HALO Home Services depends on the seamless execution of the cycle, with each department playing a pivotal role. Identifying and addressing any lapses in maintaining the cycle is essential for the company's sustained growth and customer satisfaction.

Job Description

Job Title: Branch 3 Inspector

Department: Sales

Reports To: Sales Manager

ESSENTIAL DUTIES AND RESPONSIBILITIES include the following. Other Duties may be assigned.

Follows up on all clients' appointments.

Completes all necessary paperwork in accordance with company policies.

Estimates **ALL** available work on client property.

Sells the appropriate treatment for properties.

Prices jobs according to the Company's standard pricing rates.

Prospect for new clients

Keeps vehicle maintenance up to date

Inspect all properties in accordance with S.P.C.B and HALO's Policy

Make sure all WDO and paperwork is turned in by end of day

Maintain current CDL with fewer than 1 points

SUPERVISORY RESPONSIBILITIES NONE

QUALIFICATIONS

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

EDUCATION and/or EXPERIENCE

Branch 3 field reps license. Branch 2 field reps license.

Physical Demands: Climb one and two-story ladders. Lift 25 lbs, crawl into sub-structures and attic spaces. Look up for 10min periods at a time.

WORK ENVIRONMENT

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

SALES

Total Sales Goal

Your total sales goal per month is at least \$40,000. After the probation period (30 Days) the sales goal will be increased to \$50,000 with the expectation that your referral network and your prospecting plan is functional. This goal exists even when leads are light or marketing strategies fall short. It is important to use the tools available in this playbook to generate sales in accordance with your goals.

Lead Distribution

Leads are distributed based on a the HALO "League" ranking. Your ranking will be determined by your SPL (Sale Per Lead) Your first month you will automatically rank as a "Major League" player. It is assumed that you will average \$1000 SPL. \$1000 SPL is the calculation to determine your sales goal. 40 Completed leads = \$40,000 in sales. Maintaining that standard keeps you in Major League and 65+ Leads per month when possible. Between \$900-\$1000 moves you to "Triple A" and 50 leads per month. League rankings are determined on a month-by-month basis.

Tracking Progress

An average inspector will have a 40% close rate and a \$900 sale per lead. These are the base metrics for understanding how well you are doing. If you are under in either of these numbers then you fall below average. It is important that you, as the professional inspector/sales person, be able to track your success, set goals and manage your success.

Close Rate Calculation: Number of sales divided by number of leads. 40 sales divided by 85 leads for example = 47% close. In a smaller example if you saw 10 leads that should at some point result in 4 sales. 20 leads 8 sales. 30 leads 12 sales. 40 leads 16 sales. Etc

Sale Per Lead Calculation: Number of leads multiplied by \$900. Example: If you run 15 leads you should, either by closing on the spot or follow ups, have \$13,500 in sales from those leads. In any given month when you run 65 leads you should be have roughly \$58,500 in sales.

Consideration: The metrics are based in historical data and useful for running a healthy business however, you should know, that these numbers are averages. One customer will give you \$1500 and another customer will give you \$4000. You will run the averages over a week, month, quarter.

Setting Goals: Below Average inspectors don't set goals or track their success. Average inspectors set modest weekly goals (\$10,000 per week) 3 referrals, etc to stay on track and motivated to hit their metric.

Great inspectors set bodacious goals (\$20,000 per week or more) 5 referrals per week. Great inspectors know what they are worth and what they want, and nothing will keep them from getting it. These inspectors know what they want to earn and won't let anything stop them.

Mind Set: There is always room for average inspectors. There is nothing wrong with it. You will never get written up or reprimanded for being average. Average is the back bone of the company. I have seen great and know what it looks like. These guys succeed for nothing other than success itself. Great inspectors are important but rare.

Rate Card:

Your rate card for HALO services is a starting point. You can charge as much as your professional sales skills will allow without ripping off the customer or making unhealthy promises. In order to hit your sales goal of \$54,000 in the above example you can do 1 of 2 things

Sell a single service for \$2250

Sell multiple services. Termite, pest control, rodent exclusion and repairs are the key services all of our customer need.

Identifying and documenting all problems on the property will allow you more opportunity to serve the prospect.

HALO Pricing Model

The Halo pricing model allows for maximum negotiation and flexibility. The rate card, which you will get later, has a starting price that automatically includes a one-year warranty for the entire home for the specific WDI treated. Each year warranty is worth \$349 and you can lock them into that price for up to 3 years if they pay the 3 years in advance. Here is an example of how our rate card works and how your commissions are effected.

Starting price for ADVANCE is \$1450 for a house 1400 sqft and under. You can sell them a 2 year plan for $\$1450 + \$349 = \$1799$. Under rate card would mean that you sold ADVANCE with a 1 year warranty for below \$1450, which is completely fine, as long as you are willing to sacrifice 5% commission. Often its better to have 5% of something rather than 10% of nothing.

If budget is a big issue and the homeowner does not care about warranty then you can subtract \$349 from the starting price of \$1450 = \$1101 with NO WARRANTY. This must also be in writing with clear documentation. That means that when, in the future, they get termites again, they will need to pay another fee.

Under: Under means that you sold something for below card rate

\$1450 Advance with a GUARDIAN upgrade is under unless HALO is having a promotion or you get special permission to do so.

Consultative Sales

You are a consultant. You ask questions and provide the solutions that best fit our prospects needs and desires. It is important that while consulting, after your inspection, that you sit down somewhere. This allows the necessary time to consult the prospect on the solution to their problem. Much more about sales is found below in the sales training section. Do not skip that section.

Prospecting

This is the art of generating leads from people you network with, call on the phone, connect with on social media etc. Start a separate social media account just for your professional life. Like and follow people whom you know can give you business. Go door to door handing out your card.

You should enter every day as if you were working 8-10 hours. Even on days when leads are light you should behave as if you have a task to perform. As a professional salesperson your goal is to earn new business. Handing out your business card and networking and cold calling are great ways to get new leads. Prospecting is a critical part of being a professional salesperson. Prospecting activity will become very important if your referral gathering is insufficient. Ex: If you only get 10 referrals it will be expected that you obtained at least $\frac{10}{5} = 2$ leads

through prospecting.

Scheduling policy for these leads is simple. If you pursued the lead, then it's yours. Someone who calls in a year from now and says "my neighbor used you" does not qualify as a "card in field" because you did not pursue it and they don't care who we send. It will not count toward your Card in field goal. This being the case we will always attempt to place these on the original inspector's schedule if possible. Become familiar with your "Post Close" presentation to gain more referrals.

Social media prospecting

You should create a social media account on Facebook, Instagram and LinkedIn, to prospect realtors, builders and property management companies. It should be your first name followed by your pest guy as your last name. You can also create a page to get people to join. Post yourself doing inspections, treating for pests or getting a great review from a customer. This stuff works.

Referrals: 12-15 referrals are required per month

Referrals are leads, historically called "Card in Field", that you received on your own. Its always been company policy to get 10 or more Card in fields per month.

Ways to get a Card in Field:

Make a customer happy and ask them for the names and numbers of people who want to be happy too. Doing PR calls, calls after treatment, is imperative to ensuring referrals. This may sound like " Hey (customer name) this is (inspector name). I told you I would call after treatment. I noticed that you had (Technician name) saving your home. What did you think?" Say this in such a way that you are impressed with this tech. Once they tell you how great he was simply agree and then say something like this..." Ya I get that allot. As you can imagine spreading the good word of HALO and generating referrals is important to our success. You wouldn't happen to have anyone in mind that you could introduce me to that had the same problem you did...would you?"

FACT: If you never do this step you will not hit your goal. Make this a habit and you will have success greater than you can imagine.

Review Goals

HALO inspectors should have honoring our customers as the main priority of their visit to the home. By doing so you will earn 5 star reviews on Yelp, Angi, Thumbtack and other sites. Inspectors **must maintain 5 or more** reviews per month.

Clover Leaf

Clover leafing is an important part of supporting the HALO marketing effort. Both you and the inspectors are required to drop door hangers on homes adjacent to the ones that we inspect and treat with the goal of spreading the HALO message of high quality treatments at a fair price. Any leads that you personally call into the office, from your interaction with neighbors, will earn you \$60. Someone who got only 5 per month would earn \$300

Follow Up Strategy

The money is in the follow ups. Every professional sales person knows this and creates strategies for making sure that their pipeline is always being updated. When we say "follow up" we mean touches. You may need to find creative ways to let the prospect know that you are still interested in working with them and that you will be as helpful, and persistent, as necessary to ensure that knowledge.

When you finish their WDO report. Send a text letting them know that you sent the WDO report. The next day call and ask if they had a chance to look at it or if they have any questions. Touch 3 is something completely unrelated. You should know what your prospect enjoys doing. Playing with their dog, going on trips, hiking, whatever. Your 3rd touch is an article, coupon or interesting fact regarding that knowledge. It tells them that you paid attention. The 4th touch is asking what can happen to help them move the project forward. The 5th can be unrelated or, if toward the end of the month, you can motivate them with a Guardian upgrade for free if they sign the contract this month.

The follow ups continue until you get an answer. The 10th follow up will be something like. “ It was a pleasure serving you however if you do not want to work with me kindly let me know. My boss requires that I keep you in my follow ups until I have an answer yes or no. Thank you”

When you get the NO. Call the office and let them know that the lead is lost.

Further Training

At HALO your career is in your own hands and in your control. Once you, with management, decide on a path of success that you want to take you will implement that plan and be accountable to accomplish it. HALO will reimburse any expenses related to your development that has a positive impact on the HALO business. Simply submit a reimbursement form once you have passed the tests that you have taken. Go to www.pested.com create an account and decide what courses to take. Once you pass the tests and obtain your license you will be reimbursed for your course. Note: Pre-operator courses are only available to those in the franchisee program. (TBD)

Schedule

First appointment by 8:00am. Official Hours are from 8:00am until all reports are done for the day and all minimum daily behaviors have been completed. Monday – Friday. Saturdays are possible upon request and if work is available.

HALO DRIVING POLICY

Any employee driving a company vehicle must at all times Maintain a current, valid and clean driver's license. i.e. remain insurable under our company's liability insurance policy. HALO will perform periodical checks of all DMV records. Drive within the posted speed limit at all times. You should drive at speeds that are safe for the conditions, when in rain and/or fog this may mean driving below the posted speed limit. You must always follow all State Driving Laws You must always stay within 5 miles of your daily route. After hours vehicle must be parked at address listed with the office Vehicles driven home must be parked in a safe and secure location until the beginning of your next working day. Vehicles are not to be driven for personal use. You are not at any time have any passengers in your vehicles that are not HALO employee's No Smoking in any HALO Vehicle

INSURANCE POLICY REQUIREMENTS

For the company to comply with its obligations under its insurance policies:
No employee under 18 years of age is allowed to drive a company vehicle.
Driver information and application forms must be approved by the Manager before any employee is assigned to drive a company vehicle. A motor vehicle report will be obtained on an employee that must verify a satisfactory safe driving record. A satisfactory safe driving record must be maintained if the employee is to continue driving a company vehicle or use a personal vehicle for business purposes.

The Company reserves the right to conduct periodic motor vehicle reports to verify continued compliance with this policy. An employee can have no more than 1 point on their record. Our insurance carries specific restrictions and no exceptions will be made to these policies.

GPS ON VEHICLES

HALO vehicles are equipped with tracking GPS with the main goal of controlling insurance costs and policy adherence. Any tampering with the device will result in policy violation write up.

FUEL CARDS

Fuel cards are for fuel only. Any attempts to purchase general merchandise will result in disciplinary action.

TOLL ROADS

If your HALO vehicle is equipped with a FAST TRACK sticker you may use the lane at peak traffic hours to avoid long traffic waits. Do not use it if there is no traffic to avoid.

TOOL GUIDELINES

Inspectors should have all of the tools necessary for the work. Knee pads, probes, measuring tool, clip board, safety glasses, field sheets, various contracts and writing utensils.

DOG POLICY

It is HALO's policy that our employees should not be working around dogs. Even dogs that do not bite can be intimidated or scared by the normal use of our tools. It is your responsibility to ask the customer to remove all dogs from the work area.

Mr./ Mrs. ____ I you don't mind can I have you put the dog in another area during my treatment/ Inspection. Our company has a policy that does not allow us to work around dogs. Thank you

NO ILLEGAL DRUG POLICY.

For the safety of our employees and customers HALO Termite and Pest Control is a drug free workplace We reserve the right to randomly and with suspicion test any employee at any time for illegal substances.

VEHICLE MAINTENANCE

You are responsible for the condition of your vehicle and equipment

If your vehicle is consider to be abused it could result in disciplinary action including termination. Cleaning fees resulting from policy violations will be deducted from your pay at the end of your tenor with HALO.

Once per week please check your vehicle.

- Oil is full and oil change is current. Oil changes the last Friday of the Month
- Equipment is clean
- Ladder is in good condition
- All equipment is on the vehicle

- Spare tire changing tools
- Spare tire
- Vehicle is clean
- Tires
- Windows
- Interior
- Exterior
- Current registration (in glove box)
- Current insurance (in glove box)
- Items needed or in need of repair
- Request it from the office
- Fill out request form
- Keep requesting (I told someone about it a month ago does not cut it)

RULES ON EVERY PROPERTY

- Do not park in driveway unless doing so cannot be avoided. If you must park in driveway place your drag pan underneath the engine in the event that it leaks oil.
- Always wear a HALO Provided shirt and approved pants and shoes
- Check into the PestRoutes app as soon as you arrive. Checking into the property notifies the homeowner and the office that you have arrived
- Always knock before entering a house
- Always wear booties in the house
- Always use a drop cloth under ladder
- Always make sure clothes are covered or removed in closets with attic entrances
- Always make sure your hands are clean prior to opening and closing attic access
- Always make sure attic access is clean before you leave

8619. (a) **An inspection tag shall be posted** whenever an inspection for wood destroying pests or organisms is made. (b) If the registered company completes any work with respect to wood destroying pests or organisms, it shall post a completion tag next to the inspection tag.

NEVER PARK THE VEHICLE IN THE DRIVEWAY. If this is unavoidable place a tray under the oil pan of the vehicle to avoid any oil leaking onto driveway

Check OUT by “completing” appointment

Calling out sick

Please call in to your office CSR staff, give us the maximum amount of notice possible minimum 2 hours.

The Inspection

We do complete inspections whenever possible
MEASURE AND CUBE EVERY BUILDING
Length X Width X Height

GREETING THE HOME OWNER AND BUILDING INSPECTION VALUE

Greet and build rapport. At some point identify why you are there and explain how to make the visit better.

EXAMPLE: " I have you on my schedule for a free inspection which is usually limited by nature. I do have time today to upgrade you to a complete inspection if you like. Can I tell you what that entails?"
Homeowner says "Yes"

A complete inspection includes a scale drawing of the home, light probing to search underneath the surface for infestation. I'll do a full inspection of the attic where I will mark all of the infestation with chalk. I'll check underneath where I mark all infestation with chalk. I'll check all the windows and baseboards. I will identify several types of wood destroying pests such as drywood termites, subterranean termites, Formosan termites, 6 different types of wood boring beetles, carpenter ants and carpenter bees, fungus and dry rot. I will also identify all of the reasons they would want to be here including earth to wood contact, excessive moisture, faulty grades, wood piles etc. Everything I find I will document on this diagram that will be used to create a State report. You and the State will get a copy. As you can imagine this inspection usually costs about \$400 but I can upgrade you today for only (specify amount). This type of inspection is necessary if you are attempting to avoid tenting or if you want to know every pest infecting the property. What do you think? Can I upgrade the inspection?" Amounts can range from FREE to \$200

The purpose of the complete inspection conversation is to build the value for an inspection that we have normally provided for free. Without an explanation the homeowner takes this inspection for granted and assumes that it is necessary for a bid. It builds value and a sense of reciprocity. If we give them this inspection for free, knowing of its \$400 value, they will feel obligated to give you the time that you deserve in order to sell your remedy.

The Complete Inspection:

Start with a walk around the property make a scale diagram and probe the lower sections of the home (door and window frames) look for conducive conditions (faulty grade, wood piled next to house) make a note on diagram of any findings.

Next probe the exterior eaves and patios. Check at joints. And probe 3 across the shiplap and then the rafter and fascia. If any wood repair is noted measure and make notes on diagram

Mark all infestation with designation. Check the sub structure crawl entire perimeter and each pier post look for termite evidence mark the far end with your initial and year. Pay special attention to bathroom and kitchen areas for signs of moisture. Mark all infestation with designation i.e. F for fungus and year make all marks as visible as possible. Inspect the garage look for any dropping on boxes or on wall framing. Check to see if there is an access for a garage attic. Check around water heaters and washing machines. Check cold joint between house and garage. Mark all infestation with designation i.e. F for fungus and year make all marks as visible as possible.

8619. (a) An inspection tag shall be posted whenever an inspection for wood destroying pests or organisms is made. (b) If the registered company completes any work with respect to wood destroying pests or organisms, it shall post a completion tag next to the inspection tag.

Interior

Inspect the attic pay special attention to any rafters that had infestation on the exterior. Inspect under each rafter and at all attic vents, also take a close look at the joints where the rafter and ridge meet. Make any notes of inaccessible area. Mark the furthest rafter from the entrance with your initial and year, mark all infestation with designation i.e. F for fungus and year. Make all marks as visible as possible. Replace attic entrance and make sure it is clean. Inspect interior window sills and under sinks.

Your Diagram

Codes: Numbers represent the pest and letter represent the location

1 = Subterranean termites 2 = Dry wood termites 3 = fungus /dryrot. 4 = other findings. Other findings include conducive conditions or other wood destroying pests like carpenter ants, carpenter bees, beetles. 5 = inaccessible at time of inspection. If there are any areas that are not accessible, that are normally accessible, this will automatically make this a limited inspection with a recommendation for the area to be made accessible by homeowner. Often the tech can check this area when treatment is done.

Damage: Note that the pest that caused the damage gets the blame. You will note dry wood termite damage as a 2, sub damage as a 1, fungus/ drywood damage as a 3, with their own designated letter. In addition to noting damage in this way you will also make a separate cut list on the diagram.

The items on the cut list will be separated by type and size. Example: You might place a number 1 with a circle around it to note 2x6 fascia damage. In this example all 2x6 fascia will have a number 1 with a circle. Do not confuse this with your code for subterranean termites. This is a separate list that only designates wood damage. If the type of lumber or the size changes the number associated with it changes. Example: While 2x6 fascia may be, in this example, a number 1, 2x8 fascia would be a number 2 or whatever number occurs in order of your damage findings.

Each piece of repair must be purposefully measured and placed on the diagram. The cut list on your diagram will match the "items" on your wood contract. You should be able to count all of the numbered items on your diagram and match them with the exact footage on your contract.

We do things this way to make it simple for the wood crews to know exactly, without question, what they are going to be doing. The information on the diagram and the contract must match. No work will be authorized that is not on the contract and field sheet.

New Inspector Expectations

Inspection Expectations: Inspect prospect properties for infestation of Dry wood termites, Subterranean termites, Fungus/Dry Rot, conducive conditions, wood damage, Rodents, general pest, insulation and provide remedy. Mark initials in at least 3 corners of the attic and sub- structure. You must inspect the second story eaves.

Consult Client on Their Options/Remedies

Treatments: Termite treatments for Drywood only treatments include ADVANCE

Wood Damage remedy: Note ALL wood damage and the associated cost to repair/replace as noted in your price list. All measurements must be provided and diagrammed according to policy.

HALO Services



ADVANCE: HALO Advance is our drill and treat method for treating drywood termites. Dry wood termites are identified on your field sheet as the number 2 with a letter next to it. For example 2A, 2B.

The number 2 represents Drywood termite. The letter represents the location (Rafter tail, fascia, etc) Follow the label for TERMIDOR SC

You will use a 1/8 in drill bit to create a diamond

pattern to treat each infestation. Illustration below. This pattern is a tested pattern proven by the University of Riverside however if you fail in getting the product into the gallery...you failed to treat.

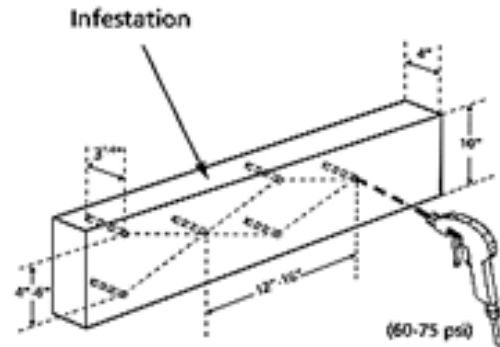


Figure 1: Drill and pressure injection of a 4" x 10" structural beam with Termidor solution.

Note: Your drill pattern needs to be as discreet as possible. For example. An infested fascia board should be treated from the back if possible as to avoid showing drill marks on the home. Rafter tails should be treated on the opposite side facing the street so that the holes are not visible from the front of the home.

In cases such as Cantilevers, patios and trim, you may be able to drill from the top and allow the product to soak. In these cases you may not be able to do a DIAMOND. When drill patterns are not visible you **MUST** take a photo of area and upload it to the customer account as (Discreetly treated) and a note to how.(From the top etc)

Treating Highly Infested Rafter Tails

When a rafter tail, which runs TOWARD the home, is highly infected it must be assumed that the infestation extends into the wall. Note framing diagram under construction. When wall infestation connected to rafter tail is possible ADVANCE requires 2 things. **First** drill and treat the rafter tail in such a way that as much of the product as possible remain in the lumber. A diamond may not be possible in highly damaged lumber. **Second:** Use the long 1/8 inch drill bit to drill deep into the rafter tail over the wall, past the blocking. This will get treatment into hard to reach areas in the attic. You will want to use foam if possible. PRINCIPLE: When defying gravity use foam when possible. **THIRD:** Drill and treat the blocking, shiplap and fascia. **FOURTH:** Use your long drill bit to drill and treat the top plate. This will happen inside the home, where the wall and ceiling meet. Drill at an angle that will allow access to the TOP PLATE. Once drilled use your BILLOW Duster with POWDER inside to treat the top plate.

Treating Attic Rafters

You will use the diamond drill pattern in the attic. You want to use gravity. Drill as high up as possible to get product into the gallery and allow it to run downward. PRINCIPLE: Any time that you can allow

gravity to assist in a treatment, be it, rafters, vertical trim, etc you should use it. Drill high and allow the product to funnel downward.

Dusting Adjacent Windows and Doors

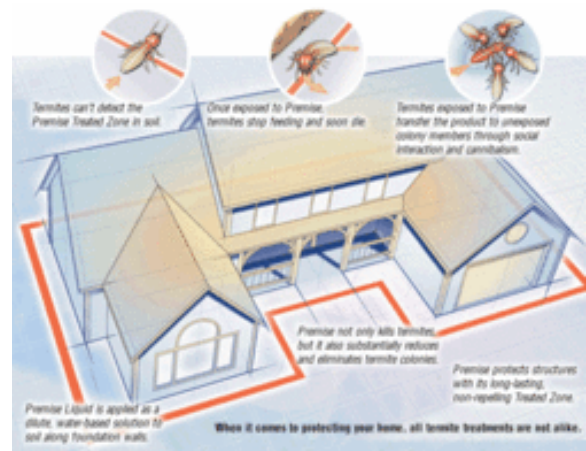
ADVANCE often includes dusting adjacent windows and door frames. If this is the case you will DISCREETLY drill where the trim meets the wall. Do not let the drill chuck touch the wall. BLOW timbor dust into the void with your billow duster. Not included in the pictures below is a STUD Finder which is essential to have for treating studs. Price starts at \$1450 with a 1 year warranty



The service provided by HALO for Subterranean termites is called BLOCKADE. Subterranean termites are indicated on the diagram as the number 1. Subterranean colonies consist of up to 1,000,000 members that forage for food by traveling through tubes that they build with moisture and dirt. The queen, that lives 30 feet underground, lays 2000 eggs per day. BLOCKADE is designed to place a treatment barrier around the property that will contaminate the workers causing them to take the product to the queen and thus eliminating the problem. Any gap in that treatment zone is a vulnerability in the treatment. Follow the label for TERMIDOR HE

RAISED FOUNDATION: Treatment occurs underneath the home by digging a 2 X 4 Trench around the interior foundation wall, around piers and pillars, placing product into trench 1 gallon per 10 linear feet, and then placing dirt back into trench to cover product.

SLAB FOUNDATION: You will drill ½ in holes every 18 inches around the property 6-12 inches from the wall. Sweep and KEEP the dust drawn from holes. You will use this later to color the new concrete patch. Use the skinny “Slab injection rod” with 360 degree tip. Inject for 3-4 seconds, slightly rotating tip, per hole until finished. Place equipment back into truck. Place concrete plugs at least 2 inch into each hole. Mix concrete and place into each hole coloring the new concrete, with the old dust, thoroughly. Drilling slab means risking hitting pipes. To avoid gas lines make sure you use your tool interrupter. Plug interrupter into the home and then plug your drill into the interrupter. This will stop the drill if you hit metal. You will want to pay close attention to the location of irrigation pipes. Note which way they are running and avoid them.



SENSITIVE MATERIALS

You may experience delicate pavers or areas where the customer will not allow drilling. In this case how do you complete the perimeter? One way is to foam the wall of the home at the areas that can not be drilled. You will also want to dust those areas for more protection. In this case drill through the

dry wall into the void to foam and dust. Price is \$10.50 per foot soil treatment and \$12.50 per foot for concrete. The minimum is \$1450



SERAPH is the combination of ADVANCE & BLOCKADE. You will follow treatment procedures for each of these services as listed above. The muscle on this service is the warranty. The warranty covers dry wood, subterranean termites, wood boring beetles, carpenter ants and carpenter bees. If you see any of these pests treat them and note the account.

Price: Calculate the ADVANCE and BLOCKADE separately and then deduct 20%

Warranty Renewals \$460 per year



GUARDIAN
TERMITE PREVENTION
A HALO EXCLUSIVE SERVICE

GUARDIAN is HALO's preventive treatment for open framing. You will notice this on the diagram and or customer notes. This service is sold one of 2 ways. From time to time the inspector will offer it for free as an upgrade with the goal of closing the deal. If there is not GUARDIAN listed on your work order you may feel comfortable upselling it yourself to make a 7% commission. Simply explain to the customer that "roofers and builders pay us \$800 to do attic or garage treatments but I can do it for only \$400 while I'm here. This adds an additional layer of prevention against future infestation. Do you want me to do it?" You are required to note the upsell and notify the office so that they can adjust the invoice. GUARDIAN is executed by placing one fifth of a gallon of

BORACARE into a one gallon sprayer. Shake well and apply to damp. Wait a few minutes and then apply again. Use warm water if possible for easier mixing. Follow the label at all costs. Price



Rats can enter into a home through a hole the size of a thumb. The goal of exclusion is to seal all possible entry points following 2 principles. **FIRST:** It must be functional. Using concrete and wire in 99% of the areas. Dry wall holes must be closed up with drywall mesh and patch..NOT SCREEN. Black foam is allowed in tight to reach areas but it can not be visible and it **MUST** be mixed with steel wool. No other foams are to be used.

SECOND: It must be especially neutral. **You must not** distract from the look of the home. Exclusion is art and science in excluding rats from the home.



FORTIFY 360 is the only rodent control service of its kind. It includes the EXCLUSION plus 3 layers of yard protection. **LAYER 1:** The fence line where we place EVOLVE birth control poison. **LAYER 2:** In harborage areas with a killing poison and **LAYER 3:** Boxes against home with Traps. Monthly and Bi-monthly follow up options. Up

OTHER SERVICES: Monthly and Bi-Monthly Pest Control, Roach, Flea and Mosquito treatments, tent fumigations.

Rodent Remedy: Note as many REP (Rodent entry points) as possible on your report to be repaired with construction grade materials and the associated price according to sqft of home.
General Pest Remedy: Note the pests that are present on property and the associated cost to control.

Energy Remedy: Note the depth of deteriorated insulation and the associated cost to bring it back to building code. Accurately measure the actual attic space and width of joists.

Customer Service Expectations:

Must be at your first stop by 8:00am sharp. You will be on the property for a minimum of 1 hour and 15 minutes. You will wear booties and use a drop cloth whenever entering the property or crawling out of an attic or sub-area.

Minimum Daily Behaviors

If, at the beginning of your day, you only have 1-2 leads you must be open to receive at least one more. The office upon receiving a lead in your area will add it to your schedule without asking.

- Get to your first appointment by 8:00am Call appointment if you will be later than the first scheduled hour.
- Make at least 8 follow up calls per day
- Make all PR Calls
- Turn in ALL paperwork as soon as you are finished with appointment. Turn in methods are office or email Complete every lead according to company policy
- Hang 5 door hangers, if provided, per stop Wear booties and use drop cloth
- Mark your initials in at least 3 corners of attic and sub-area
- Call all of your jobs being completed today to ensure everything is going to plan and to prepare them for referrals.
- At least 10 referrals per month
- 5 positive reviews per month (On whatever source they found us)
- All WDO reports must be completed by 7pm every night

Pay/Commissions

HALO pays \$45 per original inspection + Commission
Inspection fee is for original inspections only and does not include re-inspections, Quality Checks , supplemental inspections or project reviews.

COMMISSIONS FOR IN-HOUSE SERVICES 10%

Full commission is paid on all in house jobs when it meets 4 criteria

1. The job is completed
2. The job has been paid for
3. The job was priced according to rate card or over

4. You didn't give anything away for free without permission (Extra warranty, pest spray, guardian etc.)

A deduction of 5% commission will occur if the job falls under rate card. Your jobs must be sold for a total equal to or above card rate.

SUBCONTRACTED WORK: 7.5% On Net

Full commission will be paid on **NET** (what HALO gets to keep) of all sub-contracted work if the jobs meet 3 criteria

1. The job is completed
2. The job has been paid for
3. The job was priced according to rate card or over

What does net mean per service

Fumigations: full commission equals what we are charged multiplied by 2

Wood repair: Full commission equals what we are charged multiplied by 2

Insulation removal: full commission equals what we are charged multiplied by 2

Insulation install: full commission equals what we are charged multiplied by 2

Paperwork

All sold jobs must be accompanied by a deposit of no less than 10% and a SIGNED contract. It is the responsibility of the salesperson to obtain all paperwork in the event the office is not able to do so. As a professional sales person and WDO inspector it is important to take all of your paperwork seriously. It is the primary communication between field and office.

All WDO reports for the day must be completed by 7pm.

Acknowledgment

I have received the policy manual for my position

X_____ /_____/_____

Commission rates for all services priced in accordance with the above guidelines will be paid at your standard rate. If the bid falls below the standard rates or there is no contract/PO when job is turned into office without authorization your commission rate can be reduced.

X_____ /_____/_____

Gas Card Sign Off

You will be given a HALO gas credit card that can be used at any location. The card is for gas only. The gas cards need to stay with the truck and you will be assigned an individual pin code.

X_____ Sign

Date

I _____ understand that I am accountable to the pricing in this manual and will adhere to it's pricing policy.

X_____

Date _____

YOUR 30 SECOND COMMERCIAL

Your 30 second commercial tells people in a nut shell what you are all about and how you may be able to help them.

Step 1: List 4-6 PROBLEMS that your customers regularly express to you.

Step 2: Who you are. " I'm ___ with ___

Step 3: What you do. (Example "We are an OC based company that fixes computers.") "We are _"

Step 4: Who are your clients? (example "We work with residential and commercial property owners")

"We work with _

Step 5: What are your clients pains? (What "Challenges" do you help them resolve?) WHO: "Are Frustrated by .

Concerned with _____ Upset because _____ Under Pressure because _____
_____ Mad about _ Disappointed with _____

"But I don't suppose you are having problems in any of these areas, are you?"

HALO SALES TRAINING

However, as with all early and 'traditional' sales persuasion techniques and methodologies, the purpose of 'influence' is in the hands of the 'influencer' (or seller), and this purpose (product or service) may or may not be in the best interests of the customer. In other words, early thinking (and much current thinking still unfortunately) primarily focuses on influencing the other person (customer) to adopt an opinion or to take action in the direction which favors the influencer, irrespective of whether this is in the genuine best interest of the other person. Indeed, some modern criticism suggests that Carnegie's and other similar traditional selling methodologies and sales training systems lack honesty and integrity, which in my view many do.

Traditional methods - most of which continue to draw on the ideas and concepts contained in Dale Carnegie's 1937 book, tend to encourage sales people, or others seeking to persuade and influence, to use knowledge about the other person's (or customer's) perspective as a means of gaining their trust and flexibility, so that the customer can be led in a certain direction. Used unethically this amounts to manipulation and is therefore wrong and not sustainable.

Carnegie and others who have interpreted and developed his early ideas, commonly provide a good framework for understanding other people's needs and motives, but arguably the matters of ethics, honesty, integrity, sustainability, are omitted.

The purpose of using the techniques, and what to do with the understanding was, and remains, open to use or mis-use by the seller.

The question is - as sales-people - is our purpose (and responsibility) to exploit people - or to help people?

Therein lies the major difference between early (and still-practiced) traditional selling, and modern collaborative, facilitative ideas, which in my opinion are the most effective, sustainable and ethically sound concepts for today's business world.

Look at the old ideas like Carnegie's, learn the Seven Steps of the Sale, understand consultative and needs-creation selling - they all contain useful learning and processes - but most importantly, ensure you work within a strong and ethical value-system. These days selling should more than ever focus on helping people, which of course has additional implications for your choice of organization, and the products and services that you choose to represent.

The seven steps of the sale

The Seven Steps of the Sale is the most common traditional structure used for explaining and training the selling process for the sales call or meeting, including what immediately precedes and follows it. This structure is usually represented as the Seven Steps of the Sale, but it can be five, six, eight or more, depending whose training manual you're reading.

This structure assumes that the appointment has been made, or in the instance of a cold-call, that the prospect has agreed to discuss things there and then. The process for appointment-making is a different one, which is shown later in this section. Aside from the questioning stage, this structure also applies to a sales visit which been arranged for the purpose of presenting products/services or a specific proposal following an invitation, earlier discussions or meetings. For these pre-arranged presentations it is assumed that the sales person has already been through the questioning stage at prior meetings.

The Seven Steps of the Sale remains a helpful structure for sales and sales training, but do bear in mind that the concept is over forty years old, and these days the modern collaboration and facilitation methods are a lot more effective, typically when treated as a front-end to the Seven Steps or incorporated within the first stage as an approach.

The Seven steps of the sale

The original commonly used Seven Steps terminology is in bold. In recent years more sophisticated interpretation and application of the Seven-Step selling process requires the model to be expanded and interpreted with more subtlety and flexibility, as shown here:

1. Introduction/opening/approach/establish initial credibility (Rapport)
2. Questioning/identify needs/ask how and what, etc/establish rapport and trust
3. Presentation/explanation/demonstration
4. Overcoming objections/negotiating/fine-tuning
5. Close/closing/agreement/commitment/confirmation
6. Follow-up/after-sales/fulfill/deliver/admin

Introduction/opening (the seven steps of the sale - 2)

Smile - Maintain a professional demeanor and draw confidence from your thorough preparation.

Introduce Yourself - Begin by stating your first and last name, your role within the company, and a brief overview of what your company does, tailored to address the prospect's strategic concerns.

Find Common Ground - Look for shared interests or personal aspects to initiate a connection. Show genuine interest in their life and encourage them to share, fostering a sense of rapport.

Set the Scene - Clearly outline the purpose of your meeting, emphasizing that you're there to understand their situation and priorities first, before discussing how your company can address their needs. Agree on the next steps if there's potential alignment.

Ask about Time - Inquire about the prospect's availability and agree on a mutually convenient time to conclude the meeting.

Ask for Permission to Take Notes - Always seek permission before taking notes, demonstrating respect for their privacy and confidentiality.

Inquire about the Preferred Approach - Offer the option to start with either questions or a brief overview of your company, depending on the prospect's preference and their familiarity with your company's credibility. If your company is lesser known, consider providing a quick overview to establish credibility.

Questioning (the seven steps of the sale - 3)

While questioning is a vital aspect of selling, the principles and techniques of questioning are mostly transferable to other situations where questioning is essential for effective cooperation and relationships. These questioning guidelines, therefore, extend to applications beyond sales and selling. Empathy and listening are crucial in questioning, and understanding body language is useful too.

A major purpose of questioning in the traditional selling process is to identify the strongest need or benefit perceived by the prospect relating to the product/service being offered by the seller. As the questioner, you also need to understand very clearly what you are seeking from the relationship. Questioning should aim to identify a mutual fit. Relationships work when there is a good fit for both sides.

Buyers commonly have one main need or benefit, and a number of supporting needs/benefits. Needs and benefits may be

obvious to the seller and buyer, or not obvious to either, in which case questioning expertise is critical in selling, as it is in all other relationships where motives and change are involved.

Questioning must also discover how best to develop the relationship and the sale with the organization. This includes understanding how the organization decides: timings, authority levels, the people and procedures involved, competitor pressures, etc.

Good empathic questioning also builds relationships, trust, and rapport. Nobody wants to buy anything from a salesperson who's only interested in their own product or company. We all want to buy from somebody who gives the time and skill to interpreting and properly meeting our own personal needs.

To be professional in your approach, you should prepare a list of questions or headings before the discussion. Aside from complex variations, there are two main sorts of questions: open questions and closed questions. Broadly, open questions gather information and build rapport, while closed questions filter, qualify, and seek commitment.

Open questions invite the other person to give long answers, while closed questions invite the other person to say yes or no, or to select from (usually two) options. For example, red or blue, or mornings or afternoons, etc. Use open questions to gather information, typically beginning with Who? What? Why? Where? When? and How?

When training or learning the skills of using open questions, it helps to refer to the Rudyard Kipling rhyme: "I keep six honest serving men, They taught me all I knew; Their names are What and Why and When, And How and Where and Who.." This is from *Just So Stories*, 1902, *The Elephant's Child*.

Use "Can you tell me about how..." if you are questioning a senior-level contact. Generally, the more senior the contact, the bigger the open questions you can ask, and the more the other person will be comfortable and able to give you the information you need in a big explanation.

'What...?' and 'How...?' are the best words to use in open questions because they provoke thinking and responses about facts and feelings in a non-threatening way. Use 'why?' to find out reasons and motives beneath the initial answers given, but be very careful and sparing in using 'why' because the word 'why?' is threatening to many people.

Listen carefully and empathically, maintain good eye contact, and understand and show that you understand, especially understand what is meant and felt, not just what is said, particularly when you probe motives and personal aspects. Interpret and reflect back and confirm you have understood what is being explained, and if relevant the feelings behind it.

Use closed questions to qualify and confirm your interpretation. A closed question is one that can be answered with a yes or no. For example, "Do you mean that when this type of equipment goes down then all production ceases?" or "Are you saying that if a new contract is not put in place by end-March then the existing one automatically renews for another year?"

When you've asked a question, you must then be quiet. Do not interrupt. Allow the other person time and freedom to answer. The other person (your 'prospect' in selling language) should be doing 80-99% of the talking during this stage of the sales discussion. If you are talking for a third or half of the time, you are not asking the right sort of questions.

Do not jump onto an opportunity and start explaining how you can solve the problem until you have asked all your questions and gathered all the information you need. In any event, you should never be seen to 'jump' onto any issue. All the time, try to find out the strategic issues affected or implicated by the product/service in question. These are where the ultimate decision-making and buying motives lie.

If during the questioning you think of a new important question to ask, note it down, or you'll probably forget it. When you have all the information you need, acknowledge the fact and say thanks. Then take a few moments to think about, discuss, and summarize the key issues/requirements/priorities from your prospect's organizational (and personal if applicable) perspective.

Questioning is traditionally treated by conventional salespeople and conventional sales training as a process to gather information to assist the salesperson's process. This is how it is typically positioned in the old-style 'Seven Steps of the Sale'. However, modern sales methodology treats questioning in a radically different way, as an essential part of a facilitative

process whose purpose is to help the buyer decide.

Questioning is a fundamentally important part of selling, with techniques being increasingly developed and refined far beyond early selling techniques. It is transferable to and from other disciplines, notably coaching, counseling, therapy, etc.

Presentation (the seven steps of the sale - 4)

The sales presentation should focus on a central proposition, which should be the unique perceived benefit that the prospect gains from the product/service. During the questioning phase, the salesperson will have refined the understanding (and ideally gained agreement) as to what this is. The presentation must now focus on 'matching' the benefits of the product with the needs of the prospect so that the prospect is entirely satisfied with the proposition.

The salesperson, therefore, needs an excellent understanding of the many different organizational benefits that accrue to customers and why, from the product/service. These perceived benefits will vary according to the type of customer organization (size, structure, market sector, strategy, general economic health, culture, etc.).

The sales presentation must demonstrate that the product/service meets the prospect's needs, priorities, constraints, and motives, or the prospect will not even consider buying or moving to the next stage. This is why establishing the prospect's situation and priorities during the questioning phase is so vital.

The above point is especially important to consider when the salesperson has to present on more than one occasion to different people or groups, who will each have different personal and organizational needs and will, therefore, respond to different benefits (even though the central proposition and main perceived benefit remain constant).

All sales presentations, whether impromptu (off the cuff) or the result of significant preparation, must be well-structured, clear, and concise, professionally delivered, and have lots of integrity. The quality and integrity of the presentation are always regarded as a direct indication of the quality and integrity of the product/service.

It follows, then, that the salesperson must avoid simply talking about technical features from the seller's point of view without linking the features clearly to organizational context and benefit for the prospect. Also, avoid using any jargon which the prospect may not understand.

Sales presentations must always meet the expectations of the listener in terms of the level of information and relevance to the prospect's own situation, which is another reason for proper preparation. A vague or poorly prepared sales presentation sticks out like a sore thumb, and it will be disowned immediately.

When presenting to influencers, which is necessary on occasions, it is important to recognize that the salesperson is effectively asking the influencers to personally endorse the proposition and the credibility of the selling organization and the salesperson. So, the influencers' needs in these areas are actually part of the organizational needs of the prospect company.

The presentation must include relevant evidence of success, references from similar sectors and applications, facts, and figures - all backing up the central proposition. Business decision-makers buy when they become satisfied that the decision will either make them money, save them money or time; they also need to be certain that the new product/service will be sustainable and reliable. Therefore, the presentation must be convincing in these areas.

Private consumer buyers ultimately buy for similar reasons but for more personal ones as well, such as image, security, ego, etc., which may need to feature in these types of presentations if they form part of the main perceived benefit.

While the presentation must always focus on the main perceived benefit, it is important to show that all the other incidental requirements and constraints are met. But do not over-emphasize or attempt to 'pile high' loads of incidental benefits as this simply detracts from the central proposition.

Presentations should use the language and style of the audience. For example, technical people need technical evidence; sales and marketing people like to see flair and competitive advantage accruing for their own sales organization; managing directors and finance directors want clear, concise benefits to costs, profits, and operating efficiency. Generally, the more

senior the contact, the less time you will have to make your point - no-nonsense, no frills, but plenty of relevant hard facts and evidence.

If the salesperson is required to present to a large group and in great depth, then it's extremely advisable to enlist the help of one or two suitably experienced colleagues, from the appropriate functions, such as technical, customer service, distribution, etc. In which case, the salesperson must ensure that these people are properly briefed and prepared, and the prospect notified of their attendance.

Keep control of the presentation, but do so in a relaxed way. If you don't know the answer to a question, don't waffle - say you don't know and promise to get back with an answer later, and make sure you do. Never knock the competition - it undermines your credibility and integrity. Don't even imply anything derogatory about the competition.

If appropriate, issue notes or a copy of your presentation. Use props, samples, and demonstrations if relevant and helpful, and make sure it all works properly. During the presentation, seek feedback, confirmation, and agreement as to the relevance of what you are saying, but don't be put off if people stay quiet.

Invite questions at the end, and if you are comfortable, at the outset invite questions at any time - it depends on how confident you feel in controlling things. Whether presenting one-to-one or to a stern group, relax and be friendly - let your personality and natural enthusiasm shine through. People buy from people who love and have faith in their products and companies.

Overcoming objections/negotiating

Decades ago, it was assumed that at this stage, lots of objections could appear, and this tended to happen because the selling process was more prescriptive, one-way, and less empathic. However, successful modern selling now demands more initial understanding from the salesperson, even to get as far as presenting, so the need to overcome objections is not such a prevalent feature of the selling process. Nevertheless, objections do arise, and they can often be handled constructively, which is the key.

If objections arise, firstly, the salesperson should qualify each one by reflecting back to the person who raised it, to establish the precise nature of the objection. "Why do you say that?" or better still, "What makes you say that?" is usually a good start. It may be necessary to probe deeper to get to the real issue by asking why to a series of answers. Some objections result from misunderstandings, and some are used to veil other misgivings which the salesperson needs to expose.

Lots of objections are simply a request for more information, so definitely avoid responding by trying to resell the benefit. Simply ask and probe instead. The best standard response is something like, "I understand why that could be an issue, can I ask you to tell me more about why it is and what's important for you here?"

Try to avoid altogether the use of the word 'but' as it's inherently confrontational. An old-style technique was to reflect back the objection as a re-phrased question, but in a form that the salesperson is confident of being able to answer positively. For example, if the prospect says they think it's too expensive, the salesperson reflects back, "I think what you're really saying is that you have no problem with giving us the contract, but you'd prefer the payments staged over three years rather than two? Well, I think we could probably do something about that..."

Another old-style technique used to be to isolate the objection, then to overcome it by drawing up a list of pros and cons, analyzing hidden costs, or reselling the benefits even harder, and then to close powerfully. But these days, such a contrived approach to objection handling is likely to insult the prospect and blow the salesperson's credibility.

The 'feel-felt-found' technique was another popular tactic in overcoming objections. This is a response built around the three 'feel-felt-found' elements: "I understand how you feel/why you feel that...//Other customers have felt just the same/that...//But (or 'And') when... they have found that..." The method uses empathy in stage one, neutrality and group reference in stage two, and then counters the objection and reinforces the benefits using (alleged) majority evidence in stage three, in the hope of persuading the buyer that he/she is isolated and missing out if deciding not to buy.

It is important to flush out all of the objections, and in so doing, the salesperson is effectively isolating them as the only reasons why the prospect should not proceed. But then the more modern approach is to work with the prospect in first

understanding what lies beneath each objection, and then working with the prospect to shape the proposition so that it fits more acceptably with what is required.

Avoid head-to-head arguments. Even if you win them, you'll destroy the relationship and go no further. Instead, the salesperson must enable a constructive discussion so that both the seller and the buyer are working at the problem together. Provided the basic proposition is sound, most objections are usually overcome by both the seller and the buyer adjusting their positions slightly. For large prospects and contracts, this process can go on for weeks, which is why this is often more in the negotiating arena than objection handling.

You've handled all the objections when you've covered everything that you've noted down. It's, therefore, important to keep notes and show that you're doing it. By this stage, you may have seen some signs that the prospect is clearly visualizing or imagining the sale proceeding, or even talking in terms of your working together as a supplier and customer. This is sometimes called buying warmth. Certain questions and comments from prospects are described as buying signals because they indicate that the prospect may be visualizing buying or having the product/service. In the old days, salespeople were taught to respond to early buying signals with a 'trial close', but this is widely perceived as clumsy and insulting nowadays. Instead, respond to early buying signals by asking why the question is important, and then by answering as helpfully as possible.

Close/closing/agreement

In modern selling, even when using the traditional Seven Steps process, every salesperson's aim should be to prepare and conduct the selling process so well that there are few, if any, objections, and no need for a close. The best close these days is something like "Are you happy that we've covered everything and would you like to go ahead?" or simply "Would you like to go ahead?" In many cases, if the salesperson conducts the sale properly, the prospect will close the deal himself, and this should be another aim for the salesperson - it's civilized, respectful, and actually implies and requires a high level of sales professionalism.

The manner in which a sale is concluded depends on the style of the decision-maker. Watch out for the signs: no-nonsense high-achievers are likely to decide very quickly and may be a little irritated if you leave matters hanging after they've indicated they're happy; cautious technical people will want every detail covered and may need time to think, so don't push them, but do stay in touch and make sure they have all the information they need; very friendly types may actually say yes before they're ready, in which case you need to ensure that everything is suitably covered so nothing can rebound later.

For the record, here are some closes from the bad old days - the traditional golden rule was always to shut up after asking a closing question, even if the silence became embarrassingly long - (a who-talks-first-loses kind of thing) - use them at your peril:

1. The pen close: "Do you want to use your pen or mine?" (while producing the contract and pen).
2. The alternative close: for example - "Would you like it delivered next Tuesday or next Friday?" or "We can do the T50 model in silver, and we have a T52 in white - which one would you prefer?"
3. The challenge close: "I know most men wouldn't be able to buy something of this value without consulting their wives - do you need to get your wife's permission on this?" or "Most business people in your position need to refer this kind of decision to their boss, do you need to refer it?"
4. The ego close: "We generally find that only the people who appreciate and are prepared to pay for the best quality go for this service - I don't know how you feel about it?..."
5. The negative close: "I'm sorry, but due to the holidays, we can't deliver in the three weeks after the 15th, so we can only do it next week, is that okay?"
6. The guilt close: "Over three years it might seem a lot of money, but we find that most responsible people decide they simply have no choice but to go for it when it's less than a pound/dollar a day to protect your.../safeguard your.../improve your... (whatever)."
7. The sympathy close: "I know you have some reservations that we can't overcome right now, but I've got to admit that I'm pretty desperate for this sale - my manager says he'll sack me if I don't get an order this week, and you're my last chance - I'd be ever so grateful if you'd go ahead - and I promise you we'd be able to sort out the extra features once I speak to our production people..." (How could anyone live with themselves using that one?)
8. The puppy dog close/puppy dog sale: "Let me leave it with you and you see how you get on with it."

9. The last-ditch close: (salesperson packs case and goes to leave, but stops at the door) "Just one last thing - would you tell me where I went wrong - you see I just know this is right for you, and I feel almost guilty that I've not sold it to you properly, as if I've let you down."

10. The pro's and con's list: "I can appreciate this is a tough decision - what normally works is to write down a list of all the pro's and con's - two separate columns - and then we can both see clearly if overall it's the right thing to do."

11. The elimination close: "I can see I've not explained this properly - can we take a moment to go through all the benefits and see which one is holding us back from proceeding?" (At which the salesperson lists all the benefits - the positives, and runs through each one to confirm it's not that one which is causing the problem, crossing a line through each as he goes. When he crosses the last one out he can claim that there really seems to be no reason for not going ahead.)

Follow-up/fulfillment/delivery/admin

After-sales follow-up depends on the type of product and service, but generally, for every sale, the salesperson must carry out a number of important processes:

1. Completion of paperwork: All relevant paperwork must be completed and copies provided to the customer. This paperwork typically covers the processing of the order, confirmation of the order and its details to the customer, and possibly the completion of installation and delivery specification and instructions.

2. Sales reporting: Sales reporting by the salesperson is necessary, generally on a pro-forma or computer screen. This report typically details the order value, product type and quantity, and details about the customer such as industrial sector. Each sales organization stipulates the salesperson's reporting requirements, often linked to sales commissions and bonuses.

3. Follow-up contact with the customer: The salesperson should make follow-up contact with the customer as often as necessary to confirm that the customer is happy with the way the order is being progressed. This helps reduce possible confusion and misunderstood expectations, which are a big cause of customer dissatisfaction or order cancellation if left unresolved.

4. Customer follow-up and problem resolution: Customer follow-up and problem resolution must always be the responsibility of the salesperson, who should consider themselves the 'guardian' of that customer, even if a well-organized customer service exists for general after-sales care. Customers rightly hold salespeople responsible for what happens after the sale is made, and good conscientious follow-up will usually be rewarded with referrals to other customers.

5. Networking: Follow-up is also helpful for networking purposes. Maintaining a positive relationship with customers can lead to future business opportunities and referrals.

6. Integrity indicator: Follow-up is an important indicator of integrity. When a salesperson makes a sale, they are personally endorsing the product and the company. Therefore, ensuring that value and satisfaction are fulfilled is an integral part of the modern sales function.

HALO Presentation Model

The HALO Presentation model exemplifies consultative selling and needs-creation selling, providing a structured approach for salespersons to engage with prospective customers:

H - Happening: Begin by discussing, understanding, or explaining the customer's current circumstances.

A - Affliction: Identify a difficulty or challenge faced by the customer, whether present or potential.

L - Lose: Highlight the potential negative consequences or costs associated with the identified difficulty, emphasizing how it could lead to significant organizational or business disadvantage.

O - Objective Solution (or Need-payoff): Present the solution offered by the seller's product or service as a means to address the identified difficulty, thereby providing a payoff or opportunity for improvement.

In other words:

1. Discuss, understand, or explain what's happening with the prospect.
2. Identify the affliction that exists or could arise.
3. Explain, discuss, or understand the future loss resulting from the problem for the prospect's business, emphasizing its significant organizational or business impact.
4. Present the seller's product or service as the objective solution or opportunity to rectify the problem, thereby achieving major organizational or business improvement.

The HALO model stands out as one of the most versatile, memorable, and useful sales models, providing a clear framework for salespersons to navigate discussions and effectively address customer needs.

Negotiation

The Rules and Tips for Good Negotiation

1. Have an Alternative - Negotiate with Freedom of Choice

Whether selling or buying, ensure you have alternatives to negotiate from a position of strength. If you can't walk away, you're at a disadvantage. Create an impression of uniqueness for your product or service to reinforce your negotiating position.

In negotiations, having alternatives is crucial for both sellers and buyers. This principle, often referred to as a "BATNA" (Best Alternative to a Negotiated Agreement), ensures that you negotiate from a position of strength. If you lack alternatives and can't walk away from the negotiation, you're inherently at a disadvantage. This aligns with modern psychology's emphasis on resilience and adaptability—having backup plans makes you more flexible and confident in your negotiation approach.

Here's why having alternatives is important in negotiations:

1. **Confidence and Control:** Knowing you have alternatives empowers you with confidence and a sense of control over the negotiation process. This psychological advantage allows you to assert your position more effectively and resist unfavorable terms.
2. **Reduced Fear of Failure:** Having backup options reduces the fear of failure or the consequences of not reaching an agreement. This psychological safety net encourages you to take calculated risks and explore creative solutions during the negotiation.
3. **Enhanced Leverage:** Alternatives provide leverage by giving you the ability to walk away from a deal that doesn't meet your needs or expectations. This leverage strengthens your bargaining position and encourages the other party to offer more favorable terms.

In addition to having alternatives, creating an impression of uniqueness for your product or service reinforces your negotiating position. By highlighting distinctive features, benefits, or value propositions, you differentiate yourself from competitors and increase your perceived value in the eyes of the other

party. This differentiation strategy taps into consumers' preferences for products or services that stand out, aligning with principles of branding and marketing psychology.

In summary, having alternatives and emphasizing uniqueness are essential strategies for successful negotiations. These principles empower you to negotiate from a position of strength, increase your confidence and leverage, and ultimately achieve more favorable outcomes.

2. Negotiate When the Sale is Conditionally Agreed, Not Before

Wait until there's agreement in principle before negotiating, as starting negotiations prematurely can weaken your position. Use conditional closing questions to gauge commitment.

Waiting until there's agreement in principle before diving into negotiations is a strategic move that can strengthen your position. Rushing into negotiations prematurely can dilute your bargaining power and potentially undermine your objectives. This tactic aligns with principles of strategic planning and patience.

Here's why waiting for agreement in principle is advantageous:

1. **Solidified Position**: Waiting for agreement in principle allows you to establish a firm foundation before entering negotiations. This ensures that both parties are aligned on the broader terms and objectives, reducing the likelihood of misunderstandings or conflicts during the negotiation process.
2. **Increased Leverage**: By delaying negotiations until there's agreement in principle, you enhance your leverage and bargaining power. This approach signals to the other party that you are prepared and committed, which can lead to more favorable terms and concessions during negotiations.
3. **Enhanced Clarity**: Waiting for agreement in principle provides clarity and focus, enabling both parties to prioritize key issues and streamline the negotiation process. This clarity reduces ambiguity and facilitates more efficient and productive discussions.

Incorporating conditional closing questions into your negotiation strategy is another effective technique for gauging commitment and reinforcing your position. These questions prompt the other party to consider the potential outcomes and implications of the negotiation, encouraging them to commit more fully to reaching an agreement.

Here's how conditional closing questions can strengthen your negotiation position:

1. **Encouraging Commitment**: Conditional closing questions encourage the other party to envision the benefits of reaching an agreement, motivating them to commit to the negotiation process more actively.
2. **Clarifying Intentions**: By posing conditional closing questions, you gain insights into the other party's intentions and level of commitment. This allows you to adapt your negotiation strategy accordingly and address any concerns or reservations they may have.
3. **Setting Expectations**: Conditional closing questions help set clear expectations and establish a framework for the negotiation process. This fosters transparency and trust between both parties, paving the way for more constructive and collaborative discussions.

In summary, waiting for agreement in principle and using conditional closing questions are effective tactics

for strengthening your negotiation position. These strategies enable you to solidify your position, increase your leverage, and gauge the other party's commitment, ultimately leading to more successful outcomes.

3. Aim High

Set ambitious goals to achieve the best outcome. Your starting point sets the limit, so aim high without compromising credibility.

Setting ambitious goals is a key strategy for achieving optimal outcomes in negotiations. By aiming high, you challenge yourself and the other party to strive for excellence and innovation. This approach aligns with principles of goal-setting theory and motivational psychology, which emphasize the importance of setting challenging yet achievable objectives.

Here's why setting ambitious goals is advantageous in negotiations:

1. **Maximized Potential**: Ambitious goals push you to reach beyond conventional limits and explore new possibilities. By setting high aspirations, you unlock your full potential and increase the likelihood of achieving exceptional results.
2. **Motivational Catalyst**: Ambitious goals serve as a powerful motivational catalyst, driving you to invest greater effort and resources into the negotiation process. This heightened motivation fuels creativity, perseverance, and resilience, enabling you to overcome obstacles and seize opportunities.
3. **Elevated Expectations**: Setting ambitious goals elevates expectations and raises the bar for performance. This sends a signal to the other party that you are serious and ambitious, setting a tone of excellence and professionalism for the negotiation.

However, it's essential to balance ambition with credibility to maintain trust and integrity in the negotiation process. Here's how to aim high without compromising credibility:

1. **Strategic Planning**: Before setting ambitious goals, conduct thorough research and analysis to ensure they are realistic and achievable. Strategic planning helps you assess your capabilities, resources, and external factors that may impact the negotiation outcomes.
2. **Transparent Communication**: Communicate your ambitious goals openly and transparently with the other party, emphasizing your commitment to achieving mutually beneficial outcomes. Transparency fosters trust and collaboration, laying the foundation for constructive negotiations.
3. **Flexibility and Adaptability**: Remain flexible and adaptable throughout the negotiation process, willing to adjust your goals and strategies based on new information and changing circumstances. Flexibility demonstrates your willingness to compromise and find creative solutions, enhancing your credibility as a negotiator.

In summary, setting ambitious goals is a powerful strategy for achieving the best possible outcomes in negotiations. By aiming high and maintaining credibility, you maximize your potential, motivate yourself and the other party, and elevate expectations for success. This approach fosters innovation, collaboration, and excellence, ultimately leading to more favorable negotiation results.

4. Let the Other Side Go First

Avoid being the first to state your position, especially on price, to gain an advantage. Knowing their starting point allows you to adjust your strategy.

Delaying the disclosure of your position, particularly on critical aspects like price, can provide a strategic advantage in negotiations. This tactic, often referred to as "anchoring," allows you to gather information about the other party's position before revealing your own. By withholding your position, you gain insights into their preferences, priorities, and constraints, enabling you to tailor your strategy for maximum effectiveness.

Here's why avoiding being the first to state your position is advantageous in negotiations:

1. **Information Gathering**: By refraining from stating your position upfront, you create an opportunity to gather valuable information about the other party's preferences, priorities, and constraints. This information allows you to formulate a more informed and strategic approach to the negotiation.
2. **Strategic Flexibility**: Delaying the disclosure of your position affords you greater strategic flexibility and adaptability during the negotiation process. It allows you to assess the other party's initial offer and adjust your strategy accordingly to maximize your leverage and achieve optimal outcomes.
3. **Psychological Advantage**: Keeping your position undisclosed can create a psychological advantage by placing the burden of initiating the negotiation on the other party. This subtly shifts the balance of power in your favor and increases the likelihood of achieving favorable terms.

However, it's essential to use this tactic judiciously and in alignment with ethical principles. Here's how to effectively leverage this strategy without compromising integrity:

1. **Active Listening**: Focus on active listening and probing questions to uncover insights into the other party's position and underlying interests. This allows you to gather information discreetly without prematurely disclosing your own position.
2. **Strategic Timing**: Choose strategic moments to reveal your position based on your assessment of the negotiation dynamics and the other party's behavior. Timing is crucial, and disclosing your position at the right moment can enhance its impact and effectiveness.
3. **Maintain Rapport**: Build and maintain rapport with the other party throughout the negotiation process to foster trust and goodwill. Transparency and integrity are essential for building long-term relationships, even in competitive negotiations.

In summary, avoiding being the first to state your position can provide a strategic advantage in negotiations by enabling you to gather information, maintain flexibility, and create a psychological edge. By leveraging this tactic judiciously and ethically, you can enhance your bargaining power and achieve more favorable outcomes.

5. List All of the Other Side's Requirements Before Negotiating

Understand the full scope of the other party's needs and preferences to negotiate effectively. Don't overlook personal and emotional aspects, as everything affects the deal's value.

Gaining a comprehensive understanding of the other party's needs and preferences is fundamental to negotiating effectively. This principle emphasizes the importance of empathy, active listening, and emotional intelligence in the negotiation process. By delving into the full scope of the other party's needs, including personal and emotional aspects, you can uncover hidden motivations, build rapport, and create value-added solutions that satisfy both parties.

Here's why understanding the full scope of the other party's needs is crucial in negotiations:

1. **Empathy and Rapport**: Demonstrating empathy and understanding towards the other party's needs fosters rapport and trust, creating a conducive environment for productive negotiations. This empathetic approach builds bridges and encourages open communication, laying the groundwork for mutually beneficial agreements.
2. **Uncovering Motivations**: By exploring personal and emotional aspects, you gain insights into the underlying motivations driving the other party's behavior and decision-making. Understanding their fears, aspirations, and concerns allows you to tailor your proposals in a way that resonates with their interests, increasing the likelihood of reaching a mutually satisfying agreement.
3. **Creating Value**: Recognizing the significance of personal and emotional factors in negotiations enables you to identify opportunities to create additional value beyond the explicit terms of the deal. Whether it's addressing a specific pain point or offering emotional support, incorporating these considerations enhances the overall perceived value of the agreement for both parties.

However, it's essential to approach personal and emotional aspects with sensitivity and respect. Here's how to navigate these dimensions effectively:

1. **Active Listening**: Practice active listening to fully grasp the other party's perspective, including their emotions, concerns, and underlying needs. Listening attentively and empathetically demonstrates your commitment to understanding their position and fosters a sense of validation and respect.
2. **Open Communication**: Encourage open and honest communication to create a safe space for discussing personal and emotional aspects of the negotiation. Cultivate an atmosphere of trust and transparency where both parties feel comfortable expressing their feelings and concerns without fear of judgment.
3. **Emotional Intelligence**: Develop emotional intelligence to navigate the complexities of human interactions effectively. This includes managing your own emotions, recognizing non-verbal cues, and responding empathetically to the other party's emotional cues.

In summary, understanding the full scope of the other party's needs and preferences is essential for negotiating effectively. By incorporating personal and emotional considerations into the negotiation process, you can build rapport, uncover motivations, and create value-added solutions that lead to mutually beneficial outcomes. This empathetic approach fosters trust, enhances communication, and lays the foundation for successful negotiations.

6. Trade Concessions - Don't Give Them Away

Never concede without receiving something in return. Maintain discipline and control, securing commitments in exchange for concessions.

Maintaining discipline and control in negotiations is vital to ensure that concessions are made strategically and only in exchange for valuable commitments from the other party. This principle emphasizes the importance of reciprocity and balance in the negotiation process, where each concession made should be met with a corresponding gain to preserve leverage and maximize outcomes.

Here's why maintaining discipline and control in concessions is crucial in negotiations:

1. **Preservation of Leverage**: By refraining from conceding without receiving something in return, you preserve your leverage and bargaining power throughout the negotiation. This disciplined approach ensures that concessions are not given away freely, but rather used strategically to extract meaningful commitments from the other party.
2. **Establishing Reciprocity**: Maintaining discipline in concessions establishes a culture of reciprocity, where each party is expected to offer concessions in exchange for valuable gains. This balanced approach fosters trust and fairness in the negotiation process, reducing the risk of exploitation or imbalance.
3. **Securing Commitments**: Discipline and control in concessions enable you to secure valuable commitments from the other party in exchange for concessions made. Whether it's agreeing to specific terms, timelines, or deliverables, each concession should be leveraged to obtain concrete commitments that advance your objectives.

However, it's essential to strike a balance between assertiveness and flexibility to maintain the integrity of the negotiation process. Here's how to effectively manage concessions while preserving discipline and control:

1. **Prioritize Objectives**: Clearly define your objectives and priorities before entering negotiations to guide your concession strategy. Focus on key areas where concessions can be strategically deployed to maximize value and achieve your desired outcomes.
2. **Negotiate from a Position of Strength**: Maintain discipline and control by negotiating from a position of strength, leveraging your advantages and resources to secure favorable terms and commitments. This may involve emphasizing alternative options or highlighting the value you bring to the table.
3. **Establish Clear Parameters**: Set clear parameters for concessions and establish criteria for evaluating their value and significance. This ensures that concessions are made strategically and in alignment with your overall negotiation strategy, rather than being driven by impulse or pressure.

In summary, maintaining discipline and control in concessions is essential for negotiating effectively and maximizing outcomes. By leveraging concessions strategically and securing valuable commitments in exchange, you preserve your leverage, establish reciprocity, and advance your objectives with confidence and integrity.

7. Keep the Whole Picture in Mind

Consider the entire package and its implications, as concessions can erode your position. Continuously assess effects on the overall arrangement and look for tradable concessions.

Considering the entire package and its implications is crucial in negotiations, as concessions made in one area can have ripple effects on the overall arrangement. This principle underscores the importance of strategic thinking and foresight, where negotiators evaluate the long-term consequences of concessions and seek to maintain balance and value across all aspects of the deal.

Here's why considering the entire package and its implications is vital in negotiations:

1. ****Preservation of Position****: By evaluating the broader implications of concessions, you safeguard your position and prevent erosion of your bargaining power. This holistic approach ensures that concessions are made judiciously and in alignment with your strategic objectives, rather than weakening your position unnecessarily.
2. ****Assessment of Effects****: Continuously assessing the effects of concessions on the overall arrangement allows you to anticipate potential challenges or imbalances and proactively address them. This proactive stance enables you to mitigate risks and optimize the value of the deal for both parties.
3. ****Seeking Tradable Concessions****: By considering the entire package, you identify areas where concessions can be traded strategically to create value and maintain balance. This flexible approach allows you to negotiate effectively and explore opportunities for mutually beneficial compromises that advance the interests of both parties.

However, it's essential to strike a balance between flexibility and assertiveness to avoid conceding too much ground. Here's how to effectively consider the entire package and its implications in negotiations:

1. ****Holistic Evaluation****: Conduct a comprehensive evaluation of the entire package, considering all terms, conditions, and implications before making concessions. This analysis allows you to identify potential trade-offs and assess their impact on the overall arrangement.
2. ****Continuous Assessment****: Continuously assess the effects of concessions on the overall deal throughout the negotiation process. This ongoing evaluation ensures that concessions are made strategically and in a manner that preserves the integrity and value of the agreement.
3. ****Seek Win-Win Solutions****: Look for opportunities to create win-win solutions by trading concessions strategically to address the interests and priorities of both parties. This collaborative approach fosters goodwill and promotes mutually beneficial outcomes.

In summary, considering the entire package and its implications is essential for negotiating effectively and preserving the integrity of the deal. By evaluating concessions strategically, assessing their effects on the overall arrangement, and seeking tradable compromises, you can optimize the value of the agreement and achieve mutually satisfactory outcomes.

8. Keep Accurate Notes

Maintain detailed records to stay in control of the negotiation process. Accurate notes prevent misunderstandings and ensure accountability.

Maintaining detailed records is a fundamental practice in negotiations, providing a framework for staying in control of the process and ensuring clarity, transparency, and accountability. This principle emphasizes the importance of documentation and organization in managing the negotiation dynamics effectively and mitigating the risk of misunderstandings or disputes.

Here's why maintaining detailed records is crucial in negotiations:

1. **Control and Organization**: Detailed records serve as a roadmap for navigating the negotiation process, helping you stay organized and in control of key information, deadlines, and commitments. This structured approach enhances efficiency and clarity, enabling you to manage negotiations effectively and make informed decisions.
2. **Preventing Misunderstandings**: Accurate notes and documentation help prevent misunderstandings by providing a clear record of discussions, agreements, and commitments made during the negotiation. This reduces the risk of ambiguity or misinterpretation and fosters mutual understanding and trust between parties.
3. **Ensuring Accountability**: Detailed records hold both parties accountable for their actions and commitments, serving as a reference point for tracking progress and resolving disputes. This accountability promotes transparency and integrity in the negotiation process, enhancing the likelihood of reaching mutually satisfactory outcomes.

However, it's essential to maintain confidentiality and sensitivity when handling negotiation records to protect sensitive information and maintain trust between parties. Here's how to effectively maintain detailed records in negotiations:

1. **Comprehensive Documentation**: Document all key aspects of the negotiation process, including meeting minutes, correspondence, agreements, and any relevant data or information. Ensure that records are thorough, accurate, and up-to-date to provide a comprehensive overview of the negotiations.
2. **Clear Communication**: Communicate openly and transparently with the other party about the purpose and scope of the records being maintained. Establish mutual agreement on the types of information to be documented and the protocols for sharing and accessing records.
3. **Confidentiality Measures**: Implement confidentiality measures to protect sensitive information and maintain trust and confidentiality between parties. Safeguard negotiation records using secure storage systems and access controls to prevent unauthorized disclosure or misuse.

In summary, maintaining detailed records is essential for staying in control of the negotiation process, preventing misunderstandings, and ensuring accountability. By documenting discussions, agreements, and commitments accurately and comprehensively, you enhance transparency, clarity, and trust, ultimately leading to more successful negotiation outcomes.

9. Summarize and Clarify the Negotiation as You Go

Continuously summarize and confirm understanding to prevent misunderstandings and strengthen trust. Clear communication throughout the negotiation process is essential for reaching mutually beneficial agreements.

Continuously summarizing and confirming understanding is a fundamental practice in negotiations, serving as a safeguard against misunderstandings and strengthening trust between parties. This principle underscores the importance of clear and transparent communication throughout the negotiation process, ensuring that both parties are on the same page and aligned in their understanding of key issues and agreements.

Here's why continuously summarizing and confirming understanding is crucial in negotiations:

1. **Preventing Misunderstandings**: Regular summarization and confirmation of key points help prevent misunderstandings by clarifying expectations, intentions, and interpretations. This proactive approach reduces the risk of miscommunication or misalignment and fosters mutual understanding and trust.
2. **Strengthening Trust**: Clear communication builds trust between parties by demonstrating openness, honesty, and respect for each other's perspectives. By actively engaging in summarization and confirmation, you signal your commitment to transparency and collaboration, laying the foundation for a constructive and productive negotiation process.
3. **Facilitating Alignment**: Summarization and confirmation facilitate alignment between parties by providing opportunities to address any discrepancies or discrepancies in understanding promptly. This ensures that both parties are working towards shared goals and objectives, increasing the likelihood of reaching mutually beneficial agreements.

However, it's essential to maintain a balance between thoroughness and efficiency when summarizing and confirming understanding to keep the negotiation process moving forward smoothly. Here's how to effectively incorporate this practice into negotiations:

1. **Active Listening**: Practice active listening to understand the other party's perspective fully and accurately. Paraphrase and summarize their key points to confirm your understanding and demonstrate empathy and engagement.
2. **Clarify Assumptions and Expectations**: Clarify any assumptions or expectations underlying the negotiation to ensure alignment and prevent misunderstandings. Confirm understanding of terms, conditions, and agreements to ensure clarity and avoid ambiguity.
3. **Seek Feedback and Validation**: Encourage feedback and validation from the other party to confirm that your summarizations accurately reflect their intentions and preferences. This collaborative approach fosters mutual understanding and trust, enhancing the negotiation process's effectiveness.

In summary, continuously summarizing and confirming understanding is essential for preventing misunderstandings, strengthening trust, and facilitating alignment in negotiations. By engaging in clear and transparent communication throughout the negotiation process, you enhance collaboration, reduce conflict, and increase the likelihood of reaching mutually beneficial agreements.

Getting Better: Developing as a professional sales person

If you want to learn selling skills for your own personal purposes, especially if you want to start a career in selling, here are some tips on how best to acquire and teach yourself selling skills, and gain valuable sales experience that will help you in interviews for sales jobs, or perhaps to start your own business.

First improve your understanding of which type(s) of learning and communications styles that you find most effective - look at the Gardner's Multiple Intelligence theory, and the VAK learning styles and Kolb model to get an idea of your own preferred thinking, communicating and learning styles. Your HALO sales manager will provide you with the right assessment. This will give you good indications as to your most effective selling style as well. Do you prefer to watch (films, videos, other people demonstrating sales and selling)? Do you prefer to experience it, hands on? Do you prefer to read about it (books, online learning and training like the articles above)? Do you prefer to listen (attend talks, lectures, listen to audio-tapes or CD/DVD sales courses)? Do you prefer for example: system and process, numbers and logic, people and feelings, facts and figures, concepts and ideas? Understand your own personality and strengths.

The understanding of thinking and learning styles is also a very useful sales skill in its own right. In learning about your own style, you will appreciate that other people each have their own preferred styles for learning and communicating and receiving information. This relates strongly to the style in which people prefer to receive sales information from a sales person. By learning about this, you have already begun to increase your selling capability - because you are increasing your appreciation of how and why people prefer to make decisions and to buy.

Glossary of sales and selling terms

This list is not exhaustive, and is not meant to be an endorsement of any of these techniques or terms. See the notice at the foot of the page.

accompaniment visit/accompaniment report - when a manager or supervisor or trainer accompanies a sales person while working on the sales territory, usually while meeting prospects or customers. Typically the manager would complete an accompaniment visit report on the performance of the sales person, which would be discussed, and suitable follow-up actions or training agreed.

account - a customer, usually a business-to-business organization; a major account is a large organization; a national account is a customer with branches or sites that constitute a nationwide coverage, which typically requires special pricing and senior sales attention.

active listening - term used to describe high level of listening capability and method, in which the sales person actively seeks to understand how the speaker feels, and what their issues are, in which the type of listening extends far beyond common inattentive listening. Related to empathy and Stephen Covey's principles of seeking to understand before attempting to be understood.

added value - the element(s) of service or product that a sales person or selling organization provides, that a customer is prepared to pay for because of the benefit(s) obtained.

values are real and perceived; tangible and intangible. A good, reliable, honest, expert, informed sales person becomes a very significant part of the selling organization's added value, as perceived by the customer, if not by the selling organization.

advantage - the aspect of a product or service that makes it better than another, especially the one in-situ or that of a competitor.

advertising/advertising and promotion/A&P - the methods used by a company to publicize and position its products and services to its chosen market sectors, including product launches, image and brand building, press and public relations activities, merchandising (supporting and promoting the product in retail and wholesale outlets), special offers, generating leads and enquiries, and incentivizing distributors, and agents, and arguably sales people. A&P methods are sometimes

described as above-the-line (media advertising such as radio, TV, cinema, newspapers, magazines) or below-the-line (non-'media' methods or materials such as brochures, direct-mail, exhibitions, telemarketing, and PR); advertising agencies generally receive a commission (discount 'kick-back') from above-the-line media services, but not from below the line services, in which case if asked to arrange any will seek to add a mark-up. See the marketing page.

appointment - a personal sales visit to a prospect, usually arranged by phone. See the appointment-making process.

benefit - the gain (usually a tangible cost, but can be intangible) that accrues to the customer from the product or service.

buyer - most commonly means a professional purchasing person in a business; can also mean a private consumer. Buyers are not usually major decision-makers, that is to say, what they buy, when and how they buy it, and how much they pay are prescribed for them by the business they work for. If you are selling a routine repeating predictable product, especially a consumable, then you may well be able to restrict your dealings to buyers; if you are selling a new product or service of any significance, buyers will tend to act as influencers at most. See decision-makers, and the buying techniques page.

buying facilitation® - also known as facilitative buying, generally attributed (and registered) to sales guru Sharon Drew Morgen. Extremely advanced form of personal selling, in which the central ethos is one of 'helping organizations and buyers to buy', not selling to them. See collaboration and partnership selling at the end of the section.

buying signal - a buying signal is a comment from a prospect which indicates that he is visualizing to whatever extent buying your product or service. The most common buying signal is the question: "How much is it?" Others are questions or comments like: "What colors does it come in?", "What's the lead-time?", "Who else do you supply?", "Is delivery free?" "Do you use it yourself?", and surprisingly, "It's too expensive."

buying warmth - behavioral, non-verbal and other signs that a prospect likes what he sees; very positive from the sales person's perspective, but not an invitation to jump straight to the close.

call/calling - a personal face-to-face visit or telephone call by a sales person to a prospect or customer. Also referred to a sales call (for any sales visit or phone contact), or cold call (in the case of a first contact without introduction or notice in writing).

call centre - also called a contact centre (US = center) - a department for outgoing and/or incoming (outbound/inbound) telephone calls to/from customers, commonly now extending to email communications also if useful for customer service, but not extending to email marketing. Call

centers can be primarily reactive (inbound) or proactive (outbound - covering telemarketing, telesales, and research), or both. Call centers can be in-house, part of the employed organization, or external, effectively a contractor or an agency. Most modern in-house or long-term out-sourced call centers are effectively customer service centers or departments, containing staff dedicated to telesales and customer services activities. Other types of call centre activities and operations can be concerned more with short-term telesales, telemarketing or market research campaigns. Run well a call/contact centre is a wonderful function. Run poorly call centers are a nightmare for staff and customers alike. Since the 1990s when the call centre function became de-humanized and obsessively cost-driven by many large corporations the nightmare scenario largely applies. Some call/contact centers are now such vast business units that they warrant being 'off-shored' (outsourced to countries with lower costs), which generally equates to corporate own-foot-shooting on a truly huge scale. A call centre which is inherently liable to upset customers due to inadequate levels of customer empathy and service is quite obviously utterly self-defeating. Staff turnover is unsurprisingly a major challenge in call centers.

canvass/canvassing - cold-calling personally at the prospect's office or more commonly now by telephone, in an attempt to arrange an appointment or present a product, or to gather information.

close/closing - the penultimate step of the 'Seven Steps of the Sale' selling process, when essentially the sales-person encourages the prospect to say yes and sign the order. In days gone by a Sales person's expertise was measured almost exclusively by how many closes he knew. Thank God for evolution. See the many examples of closes and closing techniques in the Seven Steps section, but don't expect to kid any buyer worth his salt today, and using one might even get you thrown out of his office. Use with great care.

closed question - a question which generally prompts a yes or no answer, or a different short answer of just two possible options, compared to open questions, which typically begin with who, what, where, when, etc., and which tend to invite much longer answers.

cold calling - typically refers to the first telephone call made to a prospective customer. More unusually these days, cold calling can also refer to calling face-to-face for the first time without an appointment at commercial premises or households. Cold calling is also known as canvassing, telephone canvassing, prospecting, telephone prospecting, and more traditionally in the case of consumer door-to-door selling as 'door-knocking'. See the cold calling page.

collaboration selling - also known as collaborative selling and facilitation selling - very modern and sophisticated, in which seller truly collaborates with buyer and buying organization to help the buyer buy. A logical extension to 'strategic' or 'open plan' selling.

See collaboration and partnership selling at the end of the section.

commodities/commoditized (products and services) - typically a term applied to describe products which are mature in development, produced and sold in vast scale, involving little or no uniqueness between variations of different suppliers; high volume, low price, low profit margin, de-skilled ('ease of use' in consumption, application, installation, etc). Traditionally the 'commodities' term applies to the 'commodities markets' which trade and set prices for fundamental commodities such as coffee, grain, oil, etc., however in a more generic sales and selling sense the term 'commoditized' refers to a product (and arguably a service) which has become mass-produced, widely available, easy to make, de-mystified, and simplified; all of which is almost invariably associated with a reduction in costs, prices and profit margins, and which also has massive implications for the sales distribution model and methods for taking the product or service to market. Commoditized products are amenable to mass-market and large-scale sales distribution methods and models, as opposed to specialized or high-complexity products, which tend to require closer customer support and greater expertise and advice at the point of selling and installation, and commissioning and application, if appropriate. An electric battery torch is a commoditized product that is freely available, at competitively low price, 'off-the-shelf' at any supermarket (or via the internet); whereas a holographic projector is only available via a specialized supplier, at relatively high cost and profit margin, potentially without a similar competing product, and requires a significant degree of technical advice and support, and possibly user-training. Similarly, a microwave oven is a commoditized product, widely available, inexpensively, off-the-self from a retail store (or via the internet); whereas an integrated commercial kitchen is a specialized system, requiring a high level of sales and selling expertise, support and installation. Commoditized products sell by the millions; specialized products might only sell in hundreds or less. All consumer products and services become commoditized over time. Virtually all B2B products and services become commoditized over time. Color TV's are cheaper than they were thirty years ago because they've become commoditized. Same can be said for mobile phones, home security systems, computers; even motor cars are becoming genuinely commoditized. In our lifetimes perhaps so too will houses and buildings.

concession - used in the context of negotiating, when it refers to an aspect of the sale which has a real or perceived value, that is given away or conceded by seller (more usually) or the buyer. One of the fundamental principles of sales negotiating is never giving away a concession without getting something in return - even a small increase in commitment is better than nothing. See the negotiation section.

consultative selling (consultation selling) - developed by various sales gurus through the 1980s by David Sandler among others, and practiced widely today, consultative selling was a move towards more collaboration with, and involvement from, the buyer in the selling process. Strongly based on questioning aimed at gaining useful information.

consumer - in the context of selling a consumer typically refers to a private or personal customer or user, as distinct from a business or organizational, or trade customer. Notably we see this term in the acronym B2C, which means 'business-to-consumer', which describes the type of business in which

the transaction and relationship is between a business and a private 'domestic' customer. A household insurer, or an estate agent, are examples of B2C sales organizations. Retail is by

its nature consumer business. A holiday company is a B2C business. B2B describes 'business-to-business' - which is trade and selling between businesses.

customer - usually meaning the purchaser, organization, or consumer after the sale. Prior to the sale is usually referred to as a prospect.

customer relationship management (CRM) - CRM is now a commonly used term to describe the process of managing the entire selling process within a department or organization. Computerized CRM systems enable management of prospect and customer details, contacts, sales history and account development. Well known examples of CRM computerized systems are Sage's ACT!, which claims (as at 2006) to be the world's most popular CRM system, and Front Range's Goldmine. Chief elements of a CRM system (or strategy, since the term is used to describe the process and methodology as well as the system) are:

- compilation and organization of data (prospects, customers, product, sales, history, etc)
- planning, scheduling and integrating customer development activities and communications
- analysis and reporting of all sales related activities and data

Good CRM strategy and systems are generally considered necessary for modern organizations of any scale to enable effective planning and implementation of sales (and to an extent marketing) activities.

cycle - see sales cycle.

deal - common business parlance for the sale or purchase (agreement or arrangement). It is rather a colloquial term so avoid using it in serious company as it can sound flippant and unprofessional.

decision-maker - a person in the prospect organization who has the power and budgetary authority to agree to a sales proposal. One of the most common mistakes by sales people is to attempt to sell to someone other than a genuine decision-maker. For anything other than a routine repeating order, the only two people in any organization of any size that are real decision-makers for significant sales values are the CEO/Managing Director/President, and the Finance Director. Everyone else in the organization is generally working within stipulated budgets and supply contracts, and will almost always need to refer major purchasing decisions to one or both of the above people. In very large organizations, functional directors may well be decision-makers for significant sales that relate only to their own function's activities. See influencer.

deliverable(s) - an aspect of a proposal that the provider commits to do or supply, usually and preferably clearly measurable.

demonstration/'demo'/'dem' - the physical presentation by the sales person to the prospect of how a product works. Generally free of charge to the prospect, and normally conducted at the prospect's premises, but can be at another suitable venue, eg., an exhibition, or at the supplier's premises.

demographics - the study of, or information about, people's lifestyles, habits, population movements, spending, age, social grade, employment, etc., in terms of the consuming and buying public; anyone selling to the consumer sector will do better through understanding relevant demographic information.

discipline - within the context of an organization this is similar to function, i.e., job role, although a discipline can refer more generally to a capability or responsibility, for example 'financial disciplines', or 'customer service disciplines', or 'technical support disciplines'. Discipline can of course mean separately 'control', others or oneself, which is certainly relevant to sales and selling, but not the reason for its inclusion in this glossary. In business-to-business selling of a complex strategic nature looking at disciplines (capabilities and responsibilities) can help to explore the different ways that people are affected by a change or proposition, which generally accompanies the sale of a product or service.

distribution/sales distribution - the methods or routes by which products and services are taken to market. Sales distribution models are many and various, and are constantly changing and new ones developing. Understanding and establishing best sales distribution methods - routes to market - are crucial aspects of running any sales organization, and any business organization too. Sales distribution should be appropriate to the product and service, and the end-user market, and the model will normally be defined by these factors, influenced also by technology and social trends. For example, commoditized mass-market consumer products (FMCG - fast-moving consumer goods, household electrical, etc) are generally distributed via mass-market consumer distribution methods, notably supermarkets, but also increasingly the internet. A lesson in changing sales distribution models, and the need for manufacturers and sellers to anticipate changes is found in the switching of book sales and CD sales from retail store distribution to websites, with the resulting demise of many retailers in those sectors. Future changes in sales distribution will see for example music transferring increasingly via online downloads, thus threatening those involved with or dependent upon physical shipping of products. B2B (business-to-business) sales distribution models have their own shape, again dependent on products and services, customer markets, technology, plus other influences such as economical trends, environmental and legislative effects, etc. Examples of B2B sales distribution models are franchising, direct sales forces (employed), direct sales forces (sales agents), telephone sales (call-centers, out-bound and in-bound), the internet (online website businesses), distributors (independent sellers who carry products and services of other manufacturers and 'principals'), and channel partners and partnering arrangements (prevalent in telecoms and IT sectors).

empathy - understanding how another person feels, and typically reflecting this back to the other person. The ability to feel and show empathy is central to modern selling methods. See the Empathy page. See also NLP (Neuro-Linguistic Programming).

ethics/ethical selling/ethical business - this would not have appeared in a selling glossary a few years ago, because the line between right and wrong was a mile wide. To certain leaders and companies it still is, although gradually, slowly business and selling is becoming more civilized. Honesty, morality and social responsibility are now crucial elements in any effective selling method, and for any sustainable business. In Spring 2008 someone left a message on my answer phone. The person said he was from 'central government', working on a 'policy piece' about e-learning, and could I give him a call back. I duly called back. After several sidesteps, the 'seller' eventually clarified that the purpose of the contact was to sell me some advertising in a directory, supposedly endorsed or approved by a 'government department'. This is a fine example of unethical selling, and unethical business too, since

the seller was clearly following a company script and set of tactics designed to deceive. Unethical business and selling have always been wrong, but nowadays they carry far greater risks for those who behave badly. Consumers are wiser and better informed. Authorizes and the courts are less tolerant and more sensitive to transgressions. In all respects today poor ethics guarantee personal and business failure. See ethical management and leadership.

FABs - features advantages benefits - the links between a product description, its advantage over others, and the gain derived by the customer from using it. One of the central, if now rather predictable, techniques used in the presentation stage of the selling process.

feature - an aspect of a product or service, eg., colour, speed, size, weight, type of technology, buttons and knobs, gizmos and gadgets, bells and whistles, technical support, delivery, etc.

feel-felt-found - old-style persuasive push/pressure technique for objection handling, dating back to the 1980s and probably earlier, based on the sales-person using a response built around the three 'feel felt found' elements: "I understand how you feel/why you feel that...//Other customers have felt just the same/that...//But (or 'And') when... they have found that..." The technique seeks first to empathise, then in stage two to move the objection into neutral area avoiding direct one-to-one (2nd person, 'you must change your mind') confrontation, and creating an artificial sense of majority experience and opinion, where in the third stage the objection can be countered and the benefits reinforced with supposed large-scale evidence, persuading the buyer that he/she (if failing to buy) is isolated and deprived of the benefits others are enjoying. The method had limited effectiveness a generation or two ago but now the tactic mostly insults people and makes the sales-person look like an idiot.

field - means anywhere out of the sales office. Field sales people or managers are those who travel around meeting people personally in the course of managing a sales territory. To be field-based is to work on the sales territory, as opposed to being office-based.

forecast/sales forecast - a prediction of what sales will be achieved over a given period, anything from a week to a year. Sales managers require sales people to forecast, in order to provide data to production, purchasing, and other functions whose activities need to be planned to meet sales demand. Sales forecasts are also an essential performance quantifier which feeds into the overall business plan for any organization. Due to the traditionally unreliable and optimistic nature of sales- department forecasts it is entirely normal for the sum of all individual sales persons' sales annual forecast to grossly exceed what the business genuinely plans to sell. See targets.

function - in the context of an organization, this means the job role or discipline, eg., sales, marketing, production, accounting, customer service, delivery, installation, technical service, general management, etc. Understanding the functions of people within organizations, and critically their interests and needs, is very important if you are selling to businesses or other non-consumer organizations.

gestation period - sale gestation period typically refers to the time from enquiry to sale, the Sales Cycle in other words, (see Sales Cycle). Awareness and monitoring of Sale Gestation Period/Sales Cycle times are crucial in sales planning, forecasting and management, for individuals sales teams and sales organizations.

hard contacts - a networking term (differentiating from 'soft contacts') - 'hard contacts' may refer to members of networking groups whose purpose is mutual referral of sales prospects. See 'soft contacts' and fuller definitions in the networking situations of the business networking article.

hard sell - aggressive forceful selling technique, popular in 1960s, and since then among advocates/practitioners of old-fashioned one-way sales methods, using high pressure and cynical tactics to cajole customers to buy. Rarely successful and never sustainable. Contrasts with 'soft sell'.

influencer - a person in the prospect organization who has the power to influence and persuade a decision-maker. Influencers will be generally be decision-makers for relatively low value sales. There is usually more than one influencer in any prospect organization relevant to a particular sale, and large organizations will have definitely have several influencers. It is usually important to sell to influencers as well as decision-makers in the same organization. Selling to large organizations almost certainly demands that the sales person does this. The role and power of influencers in any organization largely depends on the culture and politics of the organization, and particularly the management style of the two main decision-makers. See decision-makers.

intangible - in a selling context this describes, or is, an aspect of the product or service offering that has a value but is difficult to see or quantify (for instance, peace-of-mind, reliability, consistency). See tangible.

introduction - the word introduction has two different main meanings in selling: Introduction refers either to first stage of the face-to-face or telephone sales call (see the Opening stage in the Seven Steps of the Sale), or the term means a personal introduction - also called a referral - of the sales person to someone in the buying organization by a mutual friend or contact. Personal introductions of this sort tend to imply endorsement or recommendation of the seller, and since they are made by an existing contact they help greatly in establishing initial trust. The value and potency of a personal introduction generally reflects the importance of the introducing person and the strength of their relationship with the buying contact. Networking is essentially based on using (sometimes several quite informal) introductions, to connect a seller with a buyer.

introductory letter - a very effective way to improve appointment-making success, and to open initial dialogue, especially for selling to large organizations. See the introductory letters structure and template examples.

lead-time - time between order and delivery, installation or commencement of a product or service.

listening - a key selling skill, in that without good listening skills the process of questioning is rendered totally pointless. See the Levels of Listening on the Empathy page.

major account - a large and complex prospect or customer, often having several branches or sites, and generally requiring contacts and relationships between various functions in the supplier and customer organization. Often major accounts are the responsibility of designated experienced and senior sales people, which might be formed into a major

accounts team. Major accounts often enjoy better discounts and terms than other customers because of purchasing power leveraged by bigger volumes, and lower selling costs from economies of scale.

marketing - perceived by lots of business people to mean simply promotion and advertising, the term marketing actually covers everything from company culture and positioning, through market research, new business/product development, advertising and promotion, PR (public/press relations), and arguably all of the sales functions as well. It's the process by which a company decides what it will sell, to whom, when and how, and then does it. See the marketing section.

margin/profit margin - the difference between cost (including or excluding operating overheads) and selling price of a product or service. Percentage margin is generally deemed to be the difference between cost and selling price, divided by the selling price ex tax (eg something that costs \$1 and is sold for \$2 plus tax produces a 50% margin - gross margin that is - net margin is after overheads are deducted).

mark-up - this is the money that a selling company adds to the cost of a product or service in order to produce a required level of profit. Strictly speaking, percentage mark-up refers to the difference

between cost and selling price as a factor of the cost, not of the selling price. So a product costing \$1 and selling for \$2 has been given a mark-up of 100%; (at the same time it produces a margin of 50%).

needs-creation selling - a selling style popularized in the 1970s and 80s which asserted that sales people could create needs in a prospect for their products or services even if no needs were apparent, obvious or even existed. The method was for the sales person to question the prospect to identify, discover (and suggest) organizational problems or potential problems that would then create a need for the product. I'm bound to point out that this is no substitute for good research and proper targeting of prospects who have use of the products and services being sold.

negotiation/negotiating - the trading of concessions including price reductions, between supplier and customer, in an attempt to shape a supply contract (sale in other words) so that it is acceptable to both supplier and customer. Negotiations can last a few minutes or even a few years, although generally it's down to one or two meetings and one or two exchanges of correspondence. Ideally, from the seller's point of view, negotiation must only commence when the sale has been agreed in principle, and conditionally upon satisfactory negotiation. However most sales people fall into the trap set by most buyers - intentionally or otherwise - of starting to negotiate before the selling process have even commenced. See the section on negotiation for negotiating theory, rules and techniques.

networking - an increasingly popular method of developing sales opportunities and contacts, based on referrals and introductions - either face-to-face at meetings and gatherings, or by other contact methods such as phone, email, social and business networking websites, etc. See the business networking guide.

objection/overcoming objections - an objection is a point of resistance raised by a prospect, usually price ("It's too expensive.."), but can be anything at any stage of the selling process. Overcoming objections is a revered and much-trained skill in the traditional selling process⁴⁵

but far less significant in modern selling. Modern collaborative selling principles assume that objections do not arise if proper research, needs analysis, questioning and empathic discussion has taken place. Also the notion of using techniques or pressure to overcome what may be legitimate obstacles is contrary to principles of modern selling. Modern selling methods tend to identify objections much earlier in the process, and either to filter out the prospect at that stage and abandon the approach, or where objections arise from multiple decision influencers within the buyer organization, to agree collaboratively a strategy with the main contact at the prospective customer for dealing with objection(s) arising.

open/opening - the first stage of the actual sales call (typically after preparation in the Seven Steps of the Sale). Also called the introduction.

opening benefit statement/OBS - traditionally an initial impact statement for sales people to use at first contact with prospect, in writing, on the phone or face-to-face - the OBS generally encapsulates the likely strongest organizational benefit typically (or supposedly) derived by customers in the prospect's sector, eg., "Our customers in the clothing retail sector generally achieve 30-50% pilferage reduction when they install one of our Crooknabber security systems..." - N.B. The OBS is a relatively blunt instrument for modern selling - use it with extreme care for fear of looking like a total twerp.

open plan selling - a modern form of selling, heavily dependent on the sales person understanding and interpreting the prospect's organizational and personal needs, issues, processes, constraints and strategic aims, which generally extends the selling discussion far beyond the obvious product application; (in a way, it's rather like combining selling with genuinely beneficial, free, expert consultancy). In 'open plan selling' the seller identifies strategic business aims of the sales prospect or customer organization, and develops a proposition that enables the aims to be realized. The proposition is therefore strongly linked to the achievement of strategic business aims - typically improvements in costs, revenues, margins, overheads, profit, quality, efficiency, time-saving and competitive strengths areas. There is a strong reliance on seller having excellent strategic understanding of prospect organization and aims, market sector situation and trends, and access to strategic decision-makers and influencers. Open Plan Selling is also underpinned by strong ethical principles, notably honesty and the premise that persuasion and influence are unhelpful, and in this respect the methodology relates somewhat to modern ideas of facilitating and helping, as primarily featured in Buying Facilitation. The term Open Plan Selling was coined (to the best of my knowledge) by British consultant and trainer Stanley Guffogg.

open question - a question that gains information, usually beginning with who, what, why, where, when, how, or more subtly 'tell me about..' - as distinct from a closed question, for example beginning with 'Is it...?' or 'Do you...?' etc., which tend to glean only a yes or no answer.

package - in a selling context this is another term for the product offer; it's the whole product and service offering at a given price, upon given terms.

partnership selling - very modern approach to organizational selling for business-to-business sales -

perceived - how something is seen or regarded by someone, usually by the prospect or customer, irrespective of what is believed or presented by the seller, ie what it really means to the customer.

pipeline - see sales pipeline.

positioning - more a marketing than sales term, although relevant to experienced and sophisticated sellers, and related to targeting - positioning refers to how a product/service/proposition is presented or described or marketed in relation to the market place - with reference to customers, competition, image, pricing, quality, etc. Positioning basically refers to whether a proposition is being

sold appropriately - in the right way, to the right people, at the right time, in the right place, and at the right price. A potentially brilliant business can fail because its products are not positioned properly, which typically manifests as sales people being unable to sell successfully. There might be little or nothing wrong with the sales people and their skills, and the product/service, but the venture fails because the positioning is wrong. Conversely, good positioning can rescue a less than brilliant product/service. Effective selling is not only about quality and skills - its about suitability of targeting.

preparation - in the context of the selling process this is the work done by the sales person to research and plan the sales approach and/or sales call to a particular prospect or customer. Almost entirely without exception in the global history of selling, no call is adequately prepared for, and sales that fail to happen are due to this failing.

presentation/sales presentation - the process by which a sales person explains the product or service to the prospect (to a single contact or a group), ideally including the product's features, advantages and benefits, especially those which are relevant to the prospect. Presentations can be verbal only, but more usually involve the use of visuals, commonly bullet-point text slides and images on a computer display or projected onto a screen. Can incorporate a video and/or physical demonstration of the product(s).

product - generally a physical item being supplied, but can also mean or include services and intangibles, in which case product is used to mean the whole package being supplied.

product offer - how the product and/or service is positioned and presented to the prospect or market, which would normally include features and/or advantages and also imply at least one benefit for the prospect (hence a single product can be represented by a number of different product offers, each for different market niches (segments or customer groupings). One of the great marketing challenges is always to define a product offer concisely and meaningfully.

proposal/sales proposal - usually a written offer with specification, prices, outline terms and conditions, and warranty arrangements, from a sales person or selling organization to a prospect. Generally an immensely challenging part of the process to get right, in that it must be concise yet complete, persuasive yet objective, well specified yet orientated to the customer's applications. An outline proposal is often a useful interim step, to avoid wasting a lot of time including in a full proposal lots of material that the customer really doesn't need.

proposition - usually means product offer, can mean sales proposal. The initial proposition means the basis of the first approach.

professional

selling

skills

-

see

PSS

PSS - 'Professional Selling Skills' - highly structured selling process pioneered by the US Xerox (and UK Rank Xerox) photocopier sales organization during the 1960s, and adopted by countless business-to-business sales organizations, normally as the 'Seven Steps of the Sale', ever since. PSS places a huge reliance on presentation, overcoming objections and umpteen different closes. Largely now superseded by more modern 'Open Plan' two-way processes, but PSS is still in use and being trained, particularly in old-fashioned paternalistic company cultures. The regimented one-way manipulative style of PSS nowadays leaves most modern buyers completely cold, but strip it away to the bare process and it's better than no process at all.

prospect - a customer (person, organization, buyer) before the sale is made, ie a prospective customer.

puppy dog sale/puppy dog close - a method of selling or closing a deal whereby you let the customer try the product or service for free without commitment, for a limited period, in the confidence that once they live with it they won't want to give it up - just like giving someone have a puppy for a day. These days the puppy dog approach would ideally extend to giving the prospective customer some education and support about looking after the puppy so that they understand and are prepared for the changes that come with a new puppy.

questioning - the second stage of the sales call, typically after the opening or introduction in the Seven Steps of the Sale, but also vital to modern selling methods too, notably collaborative/facilitative selling. A crucial selling skill, and rarely well demonstrated. The correct timing and use of the important different types of questions are central to the processes of gathering information, matching needs, and building rapport and empathy. Questioning also requires that the sales person has good listening, interpretation and empathic capabilities. See the questioning section.

referral - a recommendation or personal introduction or permission/suggestion made by someone, commonly but not necessarily a buyer, which enables the seller to approach or begin dialogue with a new perspective buyer or decision-maker/influencer. Seeking referrals is a widely trained selling technique, in which the seller asks the buyer (or other contact) at the end of a sales call for referrals, i.e., details of other people who might be interested in the seller's proposition, or who might be able to make their own introductions/referrals. This latter scenario effectively equates to networking.

rem - common slang for remainder or remnant in any business which deals with end-of-line, left-over, or otherwise non-standard-stock items which typically are handled and disposed at attractive terms to minimize waste and write-offs.

research/research call - the act of gathering information about a market or customer, that will help progress or enable a sales approach. Often seen as a job for telemarketing personnel, but actually more usefully carried out by sales people, especially where large prospects are concerned (which

should really be the only type of prospects targeted by modern sales people, given the need to recover very high costs of sales people).

retention/customer retention - means simply keeping customers and not losing them to competitors. Modern companies realize that it's far more expensive to find new customers than keep existing ones, and so put sufficient investment into looking after and growing existing accounts. Less sensible companies find themselves spending a fortune winning new customers, while they lose more business than they gain because of poor retention activity. (The hole in the bucket syndrome, where it leaks out faster than it can be poured in.)

sales cycle - the Sales Cycle term generally describes the time and/or process between first contact with the customer to when the sale is made. Sales Cycle times and processes vary enormously depending on the company, type of business (product/service), the effectiveness of the sales process, the market and the particular situation applying to the customer at the time of the enquiry. The Sales Cycle time is also referred to as the Sale Gestation Period (ie from conception to birth - enquiry to sale). The Sales Cycle in a sweet shop is less than a minute; in the international aviation sector or civil construction market the Sales Cycle can be many months or even a few years. The funnel diagram and sales development process on the free resources section show the sales cycle from a different perspective, (and actually prior to enquiry stage). A typical Sales Cycle for a moderately complex product might be:

1. receive enquiry
2. qualify details
3. arrange appointment
4. customer appointment
5. arrange survey
6. conduct survey
7. presentation of proposal and close sale

sales forecasts - also called sales projections, these are the predictions that sales people and sales managers are required to make about future business levels, necessary for their own organization to plan and budget everything from stock levels, production, staffing levels, to advertising and promotion, financial performance and market strategies.

sales funnel - describes the pattern, plan or actual achievement of conversion of prospects into sales, pre-enquiry and then through the sales cycle. So-called because it includes the conversion ratio at each stage of the sales cycle, which has a funneling effect. Prospects are said to be fed into the top of the funnel, and converted sales drop out at the bottom. The extent of conversion success (ie the tightness of each ratio) reflects the quality of prospects fed into the top, and the sales skill at each conversion stage. The Sales Funnel is a very powerful sales planning and sales management tool.

sales pipeline - a linear equivalent of the Sales Funnel principle. Prospects need to be fed into the pipeline in order to drop out of the other end as sales. The length of the pipeline is the sales cycle time, which depends on business type, market situation, and the effectiveness of the sales process.

sector/market sector - a part of the market that can be described, categorized and then targeted according to its own criteria and characteristics; sectors are often described as 'vertical', meaning an industry type, or 'horizontal', meaning some other grouping that spans a number of vertical sectors, eg., a geographical grouping, or a grouping defined by age, or size, etc.

segment/market segment - a sub-sector or market niche; basically a grouping that's more narrowly defined and smaller than a sector; a segment can be a horizontal sub-sector across one or more vertical sectors. See the marketing page.

service contract - a formal document usually drawn up by the supplier by which the trading arrangement is agreed with the customer. Also known as trading agreements, supply agreements, and other variations. See the section on service contracts and trading agreements.

soft contacts - a networking term (used to differentiate from 'hard contacts' people and groups) - 'soft contacts' may refer to networks/groups of loose and flexible nature. See 'hard contacts' and more details about both terms in networking situations within business networking section.

solutions selling - a common but loosely-used description for a more customer-orientated selling method than the Seven Steps; dependent on identifying needs to which appropriate benefits are matched in a package or 'solution'. The term is based on the premise that customers don't buy products or features or benefits - they buy solutions (to organizational problems). It's a similar approach to 'needs-creation' selling, which first became popular in the 1970s-80s. Solutions selling remains relevant and its methods can usefully be included in the open plan selling style described later here, although modern collaborative and facilitative methodologies are becoming vital pre-requisites.

steps of the sale - describes the structure of the selling process, particularly the sales call, and what immediately precedes and follows it. Usually represented as the Seven Steps of the Sale, but can be five, six, eight or more, depending whose training manual you're reading.

tangible - in a selling context this describes, or is, an aspect of the product or service offering that can readily be seen and measured in terms of cost and value (eg., any physical feature of the product; spare parts; delivery or installation; a regular service visit; a warranty agreement). See intangible.

target/sales target - in a sales context this is the issued (or ideally agreed) level of sales performance for a sales person or team or department over a given period. Bonus payments, sales commissions,

pay reviews, job grading, life and death, etc., can all be dependent on sales staff meeting sales targets, so all in all sales targets are quite sensitive things. Targets are established at the beginning of the trading year, and then reinforced with a system of regular forecasting and reviews (sometimes referred to as 'a good bollocking') throughout the year. See forecasting.

targeting - this has a different meaning to the usual noun sense of target (above). Targeting is a marketing term - very relevant and important for sales people and sales managers too 50

which refers to the customers at which the selling effort is aimed, hence targeting. In this respect the term relates to 'target markets', or 'target sectors'. This is the customer aspect within 'positioning' of a product or service or proposition. Targeting is represented by the question: Who will buy the product/service? Deciding targeting on a company scale is normally the responsibility of a marketing department or agency, but each sales person and sales team has huge potential to develop and refine their own local targeting - so as to aim their efforts at the sectors or customers which will produce the greatest results. For example - and many sales people, especially self-employed providers and traders - completely ignore the fact that sales generally come more easily from existing or previous customers than prospective new customers to whom the supplier is completely unknown. Similarly size of prospective customer is another largely overlooked aspect of targeting. Any business will naturally have more amenable sectors of potential customers than other parts of the market. Targeting is the process by which the selling organization maximizes its chances of engaging with the most responsive and profitable customers.

telemarketing - any pre-sales activity conducted by telephone, usually by specially trained telemarketing personnel - for instance, research, appointment-making, product promotion.

telesales - selling by telephone contact alone, normally a sales function in its own right, i.e., utilizing specially trained telesales personnel; used typically where low order values prevent the use of expensive field-based sales people, and a recognizable product or service allows the process to succeed.

territory - the geographical area of responsibility of a sales person or a team or a sales organization. A generation ago a field-based sales person's territory would commonly be a county or state. Now in this globalized age, where so much selling is done online and remotely by telephone rather than by expensive face-to-face selling, field-based sales people's territories are much bigger, and can be entire countries or continental regions.

territory planning - the process of planning optimum and most cost-effective coverage (particularly for making appointments or personal calling) of a sales territory by the available sales resources, given prospect numbers, density, buying patterns, etc., even if one territory by one sales person; for one person this used to be called journey planning, and was often based on a four or six day cycle, so as to avoid always missing prospects who might never be available on one particular day of the week.

trial close - the technique by which a sales person tests the prospect's readiness to buy, traditionally employed in response to a buying signal, eg: prospect says: "Do you have them in stock?", to which the sales person would traditionally reply: "Would you want one if they are?" Use with extreme care, for fear of looking like a clumsy desperate fool. If you see a buying signal there's no need to jump on it - just answer it politely, and before ask why the question is important, which will be far more constructive.

unique/uniqueness - a feature that is peculiar to a product or service or supplier - no competitor can offer it. See the marketing section for more detail about developing unique selling propositions.

Uniqueness is a much overlooked aspect of selling. The vast majority of sales organizations focus their efforts on selling 'me too' products and services, where inevitably discussions tend to concentrate on price differences, whereas the most enlightened and

progressive sales organizations strive to develop unique qualities in the propositions, which dramatically reduces competitive pressures.

UPB - unique perceived benefit - now one of the central strongest mechanisms in the modern selling process, an extension and refinement of the product offer, based on detailed understanding of the prospect's personal and organizational needs. A UPB is your USP from the customer's perspective, in other words, what your USP means to your customer, which is a very different way of approaching selling than from the traditional angle of seller-oriented USPs. It's essential to discuss your offering in these terms with your customer. The UPB acronym and concept was developed by The Marketing Guild, who specialize in practical, innovative, and effective sales and marketing.

USP - unique selling point or proposition - this is what makes the product offer competitively strong and without direct comparison; generally the most valuable unique advantage of a product or service, for the market or prospect in question; now superseded by UPB.

variable - an aspect of the sale or deal that can be changed in order to better meet the needs of the seller and/or the buyer. Typical variables are price, quantity, lead-time, payment terms, technical factors, styling factors, spare parts, back-up and breakdown service, routine maintenance, installation, delivery, warranty. Variables may be real or perceived, and often the perceived ones are the most significant in any negotiation. See the section on negotiation.