

THE CHART

| | LEVEL 1 | LEVEL 2 | LEVEL 3 | LEVEL 4 |
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| OBJECTIVE | To open doors; to "see what's going on" | To persuade and make a sale, or to advance the prospect through the process | Customer creation and retention; to "find the fit"; upgrade the client and gain information | To continue upgrading and increase share of business |
| LEVEL OF TRUST | Neutral or distrustful | Some credibility | Credible to highly credible, based on sales person's history | Complete trust based on established relationships and past performance |
| APPROACH & INVOLVEMENT | Minimal or non-existent | Well-planned; work to get prospect to buy into the process | True source of industry information and "business intelligence" | Less formal and more comfortable because of trust and history |
| CONCERN OR SELF-ESTEEM ISSUE | Being liked | Being of service, solving a problem | Being a resource | Being an "outside insider" |
| PRE-MEETING PREPARATION | Memorize a canned pitch or "wing it" | Set objectives, pre-script questions, articulate Purpose, Process, Payoff | Research trade magazines, internet, analyze client's competition | Thorough preparation sometimes with proprietary info not available to other reps |
| POINT OF CONTACT | Buyer or purchasing agent | End users as well as buyers or purchasing agent | Buyer's end user and an "internal coach" or advocate within the client's company | "Networked" through the company; may be doing business in multiple divisions |
| PRESENTATION | Product literature, spec sheets, or rate sheets | Product solution for problem uncovered during needs analysis | System solutions | Return on investment, proof and profit improvement strategies |

▲ PREFERENCE SETTINGS

BIG IDEA: The _____ of every meeting and every client relationship is measurable.

Reality Check: The last conversation is the relationship.