



# *Sales Playbook*

*You have to be Disciplined, Consistent and Structured  
Don't Stop Thinking Big!*

**WE ARE NOT ABOUT SALES  
WE ARE ABOUT RELATIONSHIPS.  
YOU MUST ESTABLISH  
AND THEN NUTURE  
RELATIONSHIPS  
BEFORE SALES ARE MADE!**

**TRUST THE PROCESS  
SET THE GOAL  
MAKE THE  
SALE**

# **Croft** *Sales Playbook*

## **Part 1 - PLAN**

Values in Action – What We Live By	5
Know Yourself	6
Goal Setting	7
Sales Strategy Development	8
Measure Actions & Results	9
To Get There It's Attitude!	10
Success Guide	11

## **Part 2 - EXECUTE**

Who are we Targeting?	13
Know your Customer – People Buy from People	14
Be Memorable	15
Two is Better than One!!	16
Every Sales Call Has an Agenda	17
Shut Up and Listen – Don't Oversell	18
Build the Pain!!	19
Never End Sales Calls Without Clear Actions	20
Reflect & Review – Practice and Train	21

## **Part 3 - OPTIONS**

Trust Trumps Price	23
We Sell on Value NOT Price!!	24
Chase Referrals – Swim Coach Mentality	25
Embrace Objections – Be Prepared	26
Examples of Hand Written Notes	27
Huddles	28
Sales Toolkit	29

## **Part 4 - CELEBRATE** 30

# PLAN

**I will persist until I succeed.**

**I was not delivered into this world into defeat, nor does failure course my veins. I am not a sheep waiting to be prodded by my shepherd. I am a lion and I refuse to talk, to walk, to sleep with the sheep. The slaughterhouse of failure is not my destiny.**

**I will persist until I succeed.**

From the ancient scroll marked III in the greatest salesman in the world

# PLAN – 1. Values in action – What we live by

## Our Core Values – Our Heart

*“Should or Should Not’s”*

### Accountability

*Own it and deliver!*

- You are responsible for all your actions and results
- Actively engage in solutions and commit to decisions once they are made
- Ensure we keep to all commitments made to both ourselves as individuals, customers and team members
- Hold ourselves accountable to the quality of our work and the result we achieve as individual and team members

### Communication

*Get off your bum and talk to each other!*

- Communicating to people with respect and clarity is essential to a thriving workplace
- Manage colleagues & client’s expectations by proactive and transparent communication
- Timely information about what’s happening and what’s needed
- Having a forum for specific / constructive feedback
- Show tolerance and have patience
- Convey all oral, written, and non-verbal communication in a respectful, and professional manner

### Commitment

*We find a way!*

- 100% Commitment and accountability with 0 excuses 100/0 – this is our ethos
- We say we will do something we do it and never let our customers or team mates down
- We sacrifice to appease our customers
- We persevere even when things get tough and find a way

### Teamwork

*Family... always comes first!*

- We spend more time with each other than our family – like it or not we are Family!
- Encourage Others – when someone is down help them up!
- Individuals take responsibility to help others in need
- Working effectively with all people both internally and externally
- Loyal backing your work mate and always being honest with them
- Have fun together, win and celebrate together!!!!!!!!!!!!

### Passion

*Love what we do and never take ourselves too seriously!*

- Believe in ourselves, our product, our teammates and the organisation.
- You have a choice what attitude you bring on a daily basis – bring it!
- We are passionate about our workplace, our colleague, customers and exceeding their expectations every time!
- If we are down, we find a way to get up.
- We never take ourselves too seriously. We take a moment every day to see the lighter side in every situation.

### Integrity

*Take a look in the mirror*

- We are honest with our customers, colleagues but most importantly ourselves.
- We are humble enough to stand up, accept responsibility for our mistakes and commit to a solution.
- Honestly and ethics come before profits – every time!

**TASK – SELECT 2 VALUES YOU IDENTIFY WITH AND DESCRIBE HOW THEY WILL HELP IN YOUR ROLE**

# PLAN - 2. Know Yourself

Learn your own personality traits, passions, likes & dislikes. Find the profile which best matches you and how you can work with these traits when dealing with customers.

Refer to the personality profiling test:

		Less Responsive		
Less Assertive	ANALYTICAL	<p><b>TRAITS:</b> Orderly, procedural, precise, undemonstrative, quiet, conservative.</p> <p><b>CLUES:</b> Efficient, conventional decor. Few plants, pictures. Charts, graphs possible. Rather spartan, impersonal surroundings.</p> <p><b>DRESS:</b> Sensible, conservative grays. Seldom very colorful or "trendy."</p> <p><b>BEHAVIOR:</b> Speaks quietly, careful in choice of words for precision, may say something insensitive without realizing it. Slow to make decisions due to need for data and research. Tends to have non aggressive body language. Appears more serious, reserved, aloof.</p> <p><b>APPROACH:</b> Little if any small talk. Use supporting facts &amp; information, from experts if possible. Follow up in writing. Avoid invading "space," touching.</p> <p><b>CLOSING:</b> Will avoid. "Give it to me in writing." If pushed too far may become autocratic.</p>	DRIVER	<p><b>TRAITS:</b> Results oriented, impatient, high energy, very time conscious. Controls.</p> <p><b>CLUES:</b> Massive, dark furniture, awards, degrees, gadgets, other control symbols. Pictures of things, important people, clocks.</p> <p><b>DRESS:</b> Dark, conservative powerful. High contrast, gold jewelry &amp; accessories.</p> <p><b>BEHAVIOR:</b> Firm handshake, aggressive body language, especially when making a point. May speak more rapidly and loudly. Big-picture oriented. Quicker to judge and make decisions. Intense eye contact made. Likes to tell, rather than be told. Serious, does not share feelings well.</p> <p><b>APPROACH:</b> Little small talk. Be assertive, but don't overwhelm. Make appointments with time understanding. Give options. Dress appropriately.</p> <p><b>CLOSING:</b> Close quickly. Emphasize bottom line. Becomes autocratic. Under extra tension, will avoid.</p>
	AMIABLE	<p><b>TRAITS:</b> warm, open, emotional, team player, caring, supportive, concerned. Very good listener. Low key.</p> <p><b>CLUES:</b> Warm, inviting office decor. Pictures of people, pleasant places. Wood furniture &amp; fixtures, plants, flowers.</p> <p><b>DRESS:</b> Warm to bright colors, few grays. Like to vary jewelry &amp; accessories, but never garish. Clothes often reflect mood.</p> <p><b>BEHAVIOR:</b> Soft voice, slower speech. Warm, friendly, though occasionally shy. Sincere, not intense eye contact. Relaxed posture. Less time concern. Makes slower decisions. May not share concerns to spare feelings, difficult to get true commitment.</p> <p><b>APPROACH:</b> Plenty of small talk. Draw them out, get them talking. Emphasize team themes. Offer assurances. Be genuine.</p> <p><b>CLOSING:</b> Respond to pressure by giving in acquiescing, but probably not true commitment. Ask for their help to get through. Will attack when cornered.</p>	EXPRESSIVE	<p><b>TRAITS:</b> Outgoing, center of attention, motivating, results oriented, enthused. Very good talker. High energy.</p> <p><b>CLUES:</b> Warm to bright decor, accessories. Large plants, pictures of people, trophies, posters, sales results, witty sayings.</p> <p><b>DRESS:</b> More flamboyant, colorful, trendy styles. Flashy gold jewelry, diamonds. Stripes, high contrasts, soft leather shoes.</p> <p><b>BEHAVIOR:</b> Rapid speech, wide range of gestures and inflections, jokes and stories. Poor time manage, may wander from tasks. Talks and shares feelings readily. Prefers talking to listening. Spontaneous, subject to mood changes. High risk orientation.</p> <p><b>APPROACH:</b> Be personable...they like to deal with those they like. Listen well. Keep on track with questions. Emphasize results.</p> <p><b>CLOSING:</b> Use dynamic language, belief statements, close quickly. Will attack if pressured, acquiesce when cornered. Do not argue, respect "face."</p>
		Responsive		
		Assertive		

➔ **TASK - WHEN YOU KNOW YOUR PROFILE DESCRIBE WAYS YOU WOULD APPROACH A SALES CONVERSATION WITH A CUSTOMER IN YOUR SAME PROFILE- 5 DOT POINTS**

# PLAN - 3. Goal Setting

Goals not in writing are dreams!!  TASK - Work through the following Goal Sheet

## *Growth Goals - Personal and Professional*

*Keep you goals Specific, Measurable, Actionable, Relevant & Time-Bound*

What are your growth goals? Family - You - Professional

**FAMILY** (always 1st)

- 1.
- 2.
- 3.

**YOU** (health / financial / development / fun)

- 1.
- 2.
- 3.

**PROFESSIONAL**

- 1.
- 2.
- 3.

How are you going to get there? - Rituals, Routines & Habits

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.

Bucket List Items to Check Off this year?

- 1.
- 2.
- 3.

What's standing in your way? What are you going to STOP doing; START doing; KEEP doing.

STOP doing

START doing

KEEP doing

# PLAN – 4. Sales Strategy Development

**"It's not about having the right opportunities. It's about handling the opportunities right."** -Mark Hunter

Good Sales Growth requires discipline action!

**Existing Accounts – THIS IS OUR PRIORITY – TRUST HAS BEEN BUILT!**

- We have these relationship is in place, trust has been built – this is our low hanging fruit!!
- Building share of wallet is key!
- Every visit well sell an additional line!!

**New accounts – WE ALWAYS NEED NEW ACCOUNTS IN THE PIPELINE!!**


- % of your pipeline needs to be filled with new accounts
- We all need to be chasing new accounts – it is the % of them that will change given your expertise i.e. account management, business development

**WE SELL SYSTEMS & VALUE!!!**

- Chemical Systems – cost in use, compliance and safety!!
- Paper dispensing systems – look, cost in use.
- Proprietary products exclusive to us!
- Education, Training, Compliance - Custom LMS
- Our service!

**QUALITY IS REMEMBERED LONG AFTER PRICE IS FORGOTTEN**

Gucci Family Moto

 **TASK – DESCRIBE WAYS YOU WOULD APPROACH AN EXISTING CUSTOMER AND A NEW CUSTOMER TO SELL THE SAME PRODUCT LINE. 5 DOT POINTS EACH**



# PLAN – 5. Measure Actions & Results

## Things That Get Measured Get Done!

To be SUCCESSFUL in sales you NEED to measure your output!

AS A BASE LINE THIS IS WHAT WE TRACK!!

- # Calls/meeting to new / cold customers
- # Calls/meetings to existing customers
- # \$ in your pipeline

## Be Disciplined & Review your numbers!! – Own them!

PIPELINE – PIPELINE – PIPELINE!

- Make sure you have a good balance of new and existing opportunities
- Make sure you are balanced across the stages of the pipeline i.e. don't want all prospecting

## Sales is a Downstream Output that Correlates with Activity!

### Daily

1. Your sales and gross profit numbers
2. Sales allocation report – orders that have been missed or BO not sent
3. The big 5 - 5 texts / 5 emails / 5 calls

### Weekly

1. Review your sales plan 1 x week
2. Update and review Pipedrive 1 x week
3. Come to sales meetings:
  - Knowing your numbers (sales/GP & pipeline) & where you stand against budget
  - Knowing your numbers against the quarterly priorities
  - Ready to contribute trends, insights & issues
4. Low margin reports reviewed and initialled with actions

### Monthly

1. Exceed monthly GP budgets
2. Set your top 5 priorities to achieve sales plan
3. Read and review the sales playbook 1 x month
4. Review the 12 month report by the 3rd of the month & 7 days before the end of month

### Quarterly

1. Generate 20 opportunities each quarter
2. Close 7 opportunities each quarter
3. Contact your full territory quarterly

### Every day

1. Ask the person each side of you are they okay & how can I help

**The Best Compete with Themselves and Blow Their Colleagues Away – If it's not in the pipeline it is not happening!**

# PLAN – 6. It takes Attitude to get there

## Quality performance starts with a positive attitude.

### Law of Self Discipline

- Continue to ask yourself “is what I am doing now the highest valued activity I could be working on to give me greatest return and achieve my goals?”
- Do the tough tasks FIRST not LAST!
- Success comes from knowing what we should be doing, and when we should be doing it, whether we want to or not!

### Law of Responsibility

- If it's meant to be it is up to me!
- Own your performance.

### The Law of Attraction

- Half of the success of selling is in your head
- If you believe you can do something, or have something, or be somebody, you will create the circumstances

### The Law of Expectations – Think BIG!

- We are what we think we are – think bigger and raise the bar!!

**“Watch your thoughts for they become words. Watch your words for they become actions. Watch your actions for they become...habits. Watch your habits, for they become your character. And watch your character, for it becomes your destiny! What we think we become.” Margret Thatcher**

# PLAN – 7. Success Guide

Communication success with customers is about telling a story about who we are, what we do and how we can help. Remember we are selling a strong team, effective services and 75+ years of industry experience that can help a customers business. – It's not all about the product.

Why Me (Yourself)?

- 1.
- 2.
- 3.
- 4.
- 5.

Why My Company?

## Independent, 3rd Generation Family Owned Business

Locally Run, Locally Serviced, Community Focused!

- 75+ years in operation
- Largest independent family owned distributor in Australia
- National warehouse locations
- We provide value by being big enough to compete and offer the best products at competitive rates and small enough to care for each of our clients like family.

## Enhance your business

- Product & Training Experts
- Customise and Innovate your product range
- Online Procurement Platforms
- Customised Management & Reporting
- Industry Best Customer Care
- Confidence in Supply
- Australian Owned & Operated

## Cleaning Catering & Hygiene

- Washroom
- Hand Hygiene
- Personal & Health Care
- Guest Amenities
- Cleaning & Chemical Solutions
- Dispensing Equipment
- Commercial Catering Equipment
- Janitorial
- Packaging
- PPE & Gloves
- Machinery & Servicing
- Food & Industrial Manufacturing

 **TASK – WRITE DOWN 5 SUCCESS KEYS ABOUT YOURSELF YOU WOULD USE WHEN SELLING TO A CUSTOMER – EG: I HAVE A HUGE BACKGROUND IN CHEMICAL SAFETY**

# EXECUTE

**“To me, ideas are worth nothing unless executed. They are just a multiplier. Execution is worth millions.” Steve Jobs**

**“Vision without Execution is hallucination”**

**“Execution is the ability to mesh strategy with reality, align people with goals, and achieve the promised results.” Lawrence Bossidy**

# EXECUTE – 1. Who are we targeting

**"Solve customer problems and make sure that the customer is representative of a large market and then you will have a pretty good formula."** -Melanie Perkins

## Our Sweet Spot:

- Independently owned or not-for-profit businesses
  - Understand our fight with the multi-nationals and care more for supporting locals.
- Multi-site businesses
  - Ideally regionally located
  - We have the best distribution network in QLD & online ordering platform with manager approval.
- Child Care, Age Care, Hotels, Motels, Health

## Decision Makers:

- We require at least 3 points of contact across major accounts, this is where relationships need to be fostered to protect against key contact turnover.
- Purchasing; chef's, managers, site managers, general managers, managing directors, CEO's – let's continue to build relationships across businesses

## Tiered Accounts:

We need to segment and identify our accounts by vertical and ANNUAL SPEND:

### Tiered Clients

Tier 1	>\$45k
Tier 2	>\$25k
Tier 3	>12k
Tier 4	>\$3k

# EXECUTE – 2. Know Your Customers

Know your Customer – People Buy from People...and More from People They Like!

Learn your customer! Document in your phone or CRM:

- Personality Characteristics
- Likes & Dislikes
- Family – children, wife – names are key!!
- Passions and interests

ASK QUESTIONS & LISTEN!!

**“Two people who want to do business together won’t let the details keep it from happening. If two people don’t want to do business together, the details won’t make it happen”**

➡ CHOOSE 2 PERSONALITY STYLES FROM THE GUIDE BELOW AND DESCRIBE HOW YOU WOULD COMMUNICATE WITH THEM ABOUT CROFT PRODUCTS

**READY REFERENCE GUIDE**

**Personality Styles**

**Responsiveness:** The degree of control one will exert over his or her emotions.  
*"Is this person warm, open and emotional, or more guarded and reserved?"*

**Assertiveness:** The degree of control or influence one will exert over others.  
*"Is this person outspoken, hurried, and forceful, or more relaxed and contemplative?"*

<b>Assertive people...</b> Tend to take charge in groups. Walk quickly. Are quicker to voice opinions. Hate to be late – often are. Have firm handshakes. Tell, don't ask. Use aggressive body language. Will invade the "space" of others. Are impatient. Speak loudly and with conviction. Use frequent and steady eye contact. Make decisions more quickly. Will pressure others for decisions. Will take risks more readily.	<b>Less assertive people...</b> Tend to be less forceful in groups. Move more slowly, deliberately. Are less willing to state opinions. Are more organized and punctual. Are less physically aggressive. Are better listeners. Tend to lean backwards. Respect the "space" of others. Are more serene. Are less forceful when speaking. Use less frequent eye contact. Are more thoughtful decision-makers. Are less comfortable exerting will. Are less comfortable with risks.
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<b>Responsive people...</b> Are animated, gesturing speakers. Use more facial expressions. Move about a great deal. Are "people" people. Are intuitive decisions-makers. Are relationship-oriented. Will go with hunches, feelings. Seem more relaxed, friendly. Will share personal feelings. Dress less formally. Like to touch, stand close. Are less time and structure oriented. Are more "personal" managers. Enjoy small talk, anecdotes.	<b>Less responsive people...</b> Use fewer gestures when talking. Use fewer facial expressions. Move around less. Are less "people" centered. Make decisions based on facts. Are more task oriented. Are less driven by "gut" feelings. Can appear somewhat rigid. Are less likely to share feelings. Prefer more traditional styles. Will keep distance, won't touch. Are more time & structure conscious. Are often impersonal managers. Prefer little small talk.
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**Courtesy of Jack Daly**  
**888.298.6868**

# EXECUTE – 3. Be Memorable

## First Impressions

- Dress to your audience – it is always easier to dress down than up!
- Change your voicemail weekly
- EVERY CALL or MEETING MUST HAVE A PURPOSE!!
- Review; new product; understanding needs etc.

## Immediate Follow-up

- USE YOUR SALES TOOLKIT & SEPARATE YOURSELF FROM THE MASSES!!!

## Phone Message

- Update Weekly! Or more often if status change i.e. location; weather
- Stand When Recording
  1. Vibrant
  2. Cheerful
  3. Focus on Message Content – not what you're doing next
- Content of Message
  1. Welcome
  2. Name and Company
  3. Response timeframe for a week

**Be Proud we are different and always going the Extra Mile to impress our customers!**

# EXECUTE - 4. Two is better than one

## **We are a team and need each other's help to be successful**

2 people in a meeting with a prospect or existing customer is critical, this will allow:

- Display the importance we are placing on converting this customer
- 4 ears are better than 2 – remember to listen!
- 2 experts that can leverage each other's capabilities
- People will do business with people they like
  - they may end up liking 1 person over another
- You can support and critique each other post meeting
- It is the best way to learn!

**Before the meeting:**

- Have your agenda and purpose – make this clear
- Someone take the lead – know your roles
- Have fun with it!

**After the meeting**

- Debrief – how did I go?
- Be tough on each other, otherwise you will never improve.

**"Don't try to do everything by yourself, but try to connect with people and resources. Having that discipline and perseverance is really important."** -Chieu Cao



# EXECUTE – 5. Sales Call Agenda

**Every sales call has an agenda/purpose. Always work on the premise of what do I need to achieve out of this call and what is the end objective.**

Know the current status of the account

- Products; back order, current orders, new lines

How do you think we currently rate in the customer's eyes?

- Have I done what I said I would – customer perception is everything
- Communicating the reason for this call is so important
- Remember attitude is key – believe!

What is the customers objective

- Save money
- Change brands
- Product tasks
- New Products

# EXECUTE – 6. LISTEN

**Listen with your ears, your eyes and your emotions to fully understand where a customer is coming from and how you can solve their issues.**

Listen for opportunity

- Once customers are talking they will always give away problems and pain points  
There are always opportunities – even from negative feedback

1. Hear and Identify


- Listening – it's your professional duty – 2:1
- Use positive body language
- Be present – don't think about what's next in your day or what you are going to say
- Identify pain points
- Are we meeting the customers' expectations?

2. Read your customer – what are they saying

3. Make notes

4. Ask Questions, Clarify Issues, Understand what the customer is saying

5. Be attentive; Be Present

 **TASK – LIST 5 THINGS THAT YOU WOULD BE LISTENING FOR IN A MEETING THAT WOULD HELP YOU IN SELLING TO A CUSTOMER.**

# EXECUTE – 7. Build the Pain


**Our challenge is to identify their needs, desires, 'pain points' – how do we make their business, job, life, process better?? We have to PROBE!**

REMEMBER – Probing questions are as much about listening as they are about speaking!!!!

Example of Probing Questions:

- What's most important thing to you in your business currently?
- Are there any issues you experiencing at the moment?
- How much is the issue/problem costing you in time/money/resources/staff/energy?
- How much longer can you have this problem go unresolved?
- In an ideal world what are you chasing?
- Is all your compliance up to date?
- How important is compliance and safety within the business?
- If you were to improve anything what would it be?
- What is the biggest challenge you are currently facing?
- What are the top 3 things that need to be addressed currently?
- Can you please tell me more about that?
- Can you please give me an example?
- If you could design the perfect solution what would it look like?
- What priority do you place on cost savings and efficiencies?

## **NUTURE THEIR EMOTIONAL RESPONSE, GO WITH IT!!**

 **TASK – WRITE 3 PROBING QUESTIONS YOU WOULD USE IN A MEETING AND WHAT RESPONSE YOU ARE LOOKING FOR FROM A CUSTOMER.**

# EXECUTE – 8. Clear Actions

## **Never End Sales Calls Without Clear Actions and followup tasks to be completed as promised.**

1. Follow up actions
  - Manage the process
  - Be clear what you are doing after the call is finished
  - Be clear what customer is doing (giving) for you from the meeting
  - Time frames expected
  - Under promise and over deliver
  - Live our values
2. Schedule / Discuss next meeting – Time, Agenda etc
3. Ensure you complete what was promised
  - Within the expected time frame
4. Response Time – follow up reminders to ensure tasks are completed

# EXECUTE – 9. Reflect & Review

## Reflect & Review – The Best in the World Practice and Train

Reflect and review the performance

- Identify and document where you did well and where you need to improve
- Did you identify pain points?
- Refer and analyse customer personality style
- What personal things did we learn about the customer i.e. no. of children, sporting team – document it!
- What does the customer see as important to their business
- Could you have been more or less assertive – logical or emotional?

## **The Best Athletes in the World Practice their Art!!**

# OPTIONS

**“When you’re at the end of your rope, tie a knot and hold on!” Abraham Lincoln**

**“I didn’t hear no bell” Rocky Balboa**

Explore all options and angles to find the right pain point

# OPTIONS - 1. Trust Trumps Price

**Care more for the CUSTOMER THAN THE DEAL!!!**

**People buy from people they trust and like**

**Relationship is the most important aspect**

**Know your customers**

**The more times you contact a customer, the more trust that is built, the more understanding is gained**

**Respect your customer's personality types!**

 *TASK - Write down how you would sell to a customer without talking about products or price*

# OPTIONS – 2. We Sell on Value NOT Price

**This is the age old dilemma we as sale people face. In a commoditised industry where it's a race to the bottom how do we avoid the 'Price' discussion?**

Have the prospects tell YOU the value!

- As we have said identify the issues, ask the right questions and listen
- Try not to tell them the value – because they won't be listening – ask them the questions so they TELL YOU the value in solving their problems i.e. time, money, stress, compliance

Have Valuable Conversations!

- Educate the customer
- Help them establish clarity around their problem
- Customers will ideally come away thanking you for the chat!

Use your Existing Clients

- You should be telling the potential client or customers about the history of the company, which helps build confidence in the product
- Build up success stories by documenting testimonials from past successes
- Cost-In-Use & Price Guarantees
- In a number of our product verticals this needs to be a focus and lead in conversations!
- Chemical should always be sold through Cost – in – use!
- We can offer PRICE GUARANTEES that shows cost savings over a period. If these savings are not visible we adjust dilutions/lengths/costs to make sure this occurs. (Please see cost in use tables for chemical and paper use)

Leverage your Existing Customers

- You should be telling the potential client or customers about the history of the company, which helps build confidence in your offering. Build up your success stories by documenting testimonials from past successes



# OPTIONS - 3. Chase Referrals

Chase Referrals – Swim Coach Mentality

Create Trust

Earn Trust

Then We Need Referrals

- Referrals are the most loyal customers
- Price isn't number 1 with referrals
- GP is always higher from referrals

**Sometimes it's better to recommend customers to go elsewhere for a particular requirement – this creates trust**

 **TASK** - Write down 3 ideas about how you would ask a customer for a referral

# OPTIONS - 4. Embrace Objections

**The primary reason your customer doesn't buy is his/her fear of making a bad decision**

**Highest Value Objection - Always focus on the primary reason preventing the prospect from moving ahead. Answer the highest value objection first.**

Why we get objections

- People don't like change – fear of bad decision
- People don't trust you or your solution
- Previous bad experience/bad reputation
- Lack of High Value Need Development

There are only a few possible objections a customer can present:

- 1. I've been with a supplier for a long time and happy with their service**
  - a. Are you comfortable with their prices?
  - b. I am sure you won't have any objections me quoting you some of your major lines – at least you can compare the market.
  - c. Are they local?
- 2. Your prices are too high**
  - a. Great feedback if we can understand volumes I am sure we can negotiate better pricing from our manufacturers
  - b. I can guarantee you we will save you money over a 2 month period (COI).
- 3. Too many backorders previously**
  - a. If we can get an estimated monthly usage of your product lines, we will guarantee continuity of supply.
- 4. You charge us freight**
  - a. Everyone charges freight in some respect, we are just upfront & show our true cost without adding anything extra...you pay what we pay...
- 5. I am too busy to deal with this at the moment**
  - a. Happy to do the work for you; can I take a stocktake of your items and review pricing for you?
- 6. You're not based locally**
  - a. We are a proudly family owned business with local business partners in the region. YES WE ARE!!!
- 7. I don't like you**
  - a. Sorry to hear that; if there is any way we can work through it please let me know. Alternatively, I could work in the background to assist & could arrange for someone else in our company to come and see you face to face.
  - b. Perhaps we got off on the wrong foot, can I invite you for a game of golf/dinner/fishing
- 8. Poor history**
  - a. Our apologies for that, what are the specifics? We have made a lot of improvements to our business recently; let's try again. We will guarantee our service.
- 9. I am in contract with another supplier**
  - a. We are happy to assist you & review the contract, are you happy with the current situation?
  - b. Let's provide some pricing if only to compare the current market & make sure you have the best possible deal.

# OPTIONS - 5. Personal Touch

**Sometimes as easy way to build trust is through personal communication where the customer sees you have taken time to create a personal message for them through handwritten notes.**

Examples of Hand Written Notes

Dear xxxx,

Thank you for your time I know you are very busy. I wanted to let you know I truly admire your passion and understand your needs. I will be back to you within the week with your requirements. Thank you again xxxxx

Dear xxxx

I really enjoyed the coffee and love your restaurant. I Look forward to sitting down again next week to take you through my presentation. Congratulations again on your success! Thank you again xxxxx

 **TASK** - Write a sample thank you note to a customer you have just had a meeting with

# OPTIONS – 6. Huddles

**Being a part of this team requires you to HUDDLE on a weekly basis. This is the best way to gain insights from your teammates on what is happening in the market.**

Huddles are:

- High energy, fast paced & informative!
- 10 min in length.
- Metric based
- Mandatory

How they run:

- Positive from week before – you have to find one. It will be sales related and should highlight to other people opportunities across the business.
- Target Numbers:
  - Cold Calls / New Customer Visits – these are face to face calls to customers we have not yet converted
  - Proposals presented Face to Face / including demos – we need to be getting in front of prospects!
  - Existing Customer Visits
  - New Product into existing customers (ongoing product not one off) – this should always be a focus and the easiest sell.
  - Work-withs – we need to be leveraging our suppliers to sell in the marketplace!
- Agenda for today i.e. meetings planned, demos, presentations, quotes, etc.

Embrace them and enjoy it! People who are too busy to huddle need them the most!

# OPTIONS – 7. Sales Toolkit

## People do Business with People NOT Companies Make Ourselves Memorable

Don't leave the premises without sending a thank-you email

**\*\*Tip:** send a separate/different message to each person that attended the meeting vs. one group email

Don't leave the premises without writing a hand written thank-you note to each person in the meeting

Mail the thank-you note at your first opportunity

Content is Key

- Thank the recipient for taking the time to meet with you
- Reconfirm the agreed-upon next action steps
- Who is going to do what?
- What will move the deal forward?
- When can they expect you to follow up?

Do what you say you are going to do & when you say you are going to do it.

Contents of your Bag:

- Company issued thank-you notes
- Business cards
- Envelopes
- Felt tip pen (for hand written notes) – pick your own style & colour
- Ball point pen (for envelopes)
- Company issued stamps
- Personality Types

Have fun with it!!!

- When you are enjoying yourself your enthusiasm is infectious.

# CELEBRATE

**I will LAUGH at the World!! No matter how challenging the day a laugh will improve everything.**

**We need to embrace success and acknowledge it!**

**When you succeed, STOP and embrace the feeling, be in the moment!**

**It is better to Acknowledge and Celebrate someone else's success than your own – this is humility at its finest!!!**

There are resources and personnel across the group that are here to help. Everyone has something to offer, everyone has some unique value they can provide to the group. Please pick up the phone / email and start communicating with each other and share these insights.  
Be Selfless and never let your mate down!

**If everyone is moving forward together, then success will take care of itself. – Henry Ford**

# NOTES

# NOTES