

**“Take the Cold Out of Cold Calling”**

**“Fourth R”**

**Warm Call Selling Scripts**

**First Meeting Outline**

## Value-Based Selling In-Person Meeting Outline

*Following is an outline of how a first meeting in-person conversation might go, and how to establish your credibility and keep the conversation relevant to how your company can help your prospect achieve his or her company objectives.*

- I. **Introduction:** Establish your credibility right from the get go. Remember: people buy from people they like. People also like to talk about themselves. So in the first few minutes, try to reference something that you know your prospect cares about.
  - Small Talk Introduction:** If your prospect greets you with a big smile and starts the conversation with a bit of small talk (e.g. “nice weather out today”), assume you have permission to reciprocate.
  - a. **Down to Business Introduction:** Sometimes it’s clear your prospect wants to get down to business. For example, if the first thing out of your prospect’s mouth is “So... what have you got to show me today,” you should probably skip the small talk and get right to your meeting agenda.
- II. **Meeting Agenda:** Don’t waste your prospect’s time. Reaffirm how much time you’ve been given for the meeting. For example, say something like “I know we have 45 minutes together today, and this is what I’d like to discuss.”
- III. **Background Information:** Spend a few minutes prior to your meeting learning about your prospect’s company, its products and services, competitors, etc. Then in two to three minutes, summarize what you learned.
- IV. **Sharing of Information:** This isn’t you sharing information about your company yet. Rather, it’s important early on in your meeting to get your prospect sharing information about his or her company, and in particular, the key issues the company is facing in achieving its objectives.
- V. **Your Company Introduction:** You’ve spent the first part of your meeting establishing your credibility and getting your prospect comfortable talking about his or her company. Now talk about your company.
- VI. **Your Offering:** It’s now time to “make the pitch” and specifically discuss what your company can do to help your prospect. Now is the time to impress!

Instead of taking out a product catalog or using a standard PowerPoint presentation, use this time to solidify your credibility and relevance. For example, imagine how powerful your presentation could be if you said something like: “My company has clients of all kinds and sizes in many different industries, but I wanted to share with you today a story on how we helped a client just like you overcome an issue that you’ve already told me you’re facing. When I researched your company and industry, I found that a key issue to growth seems to be...” Continue this line of conversation by referencing articles you’ve read and experiences your company has where you’ve truly helped clients overcome similar issues to your prospect.

- VII. **Questions/Discussion:** Hopefully you’ve been engaging your prospect in conversation all along. If you practiced the “Fourth R” and truly have information about your prospect and his or her industry, it’s highly likely that you’ve been in a great conversation and your prospect has been sharing information and opinions. Make sure to set aside time in your agenda for your prospect to ask additional questions.
  
- VIII. **The Close:** Hopefully by this point in your meeting the close is obvious. It’s unlikely in today’s business environment that you’re going to walk away from the meeting with an order. It is likely, however, that by doing your homework and practicing the “Fourth R” that you’ve impressed your prospect enough that he or she is willing to discuss with you the next steps.
  
- IX. **The Follow-Up:** Make sure to follow up your meeting with a well-written and relevant e-mail or letter. Obviously reference your meeting in your follow-up note and summarize any next action steps you’ve agreed to take. Also note that the follow-up is a perfect time to practice the “Fourth R” again and further differentiate you and your company.

Your follow up e-mail or letter is the perfect place to reference something that was discussed in your meeting and include some information you dug up immediately following your sales call.