

## FIRST APPOINTMENT PROSPECT INTERVIEW FORM

A salesperson has two basic choices when he/she secures a first face-to-face appointment with a prospect. One is to make a *presentation*. The other is to have a *conversation*. Top salespeople agree that the *conversation* is a much better strategy.

OK, you might ask, how do I start that conversation, and where do I want it to go? This sales/organizational tool will provide you with a list of questions to ask, and here is some guidance on what you're trying to accomplish with each question. The best way to use this tool is to take the form with you on your first face-to-face appointments, using it as your guide through the conversation, and taking notes in the spaces provided.

**Question 1. Is this a company that's especially dependent on printing—or printing companies—to do it's own business?** You want to know early if you're dealing with a company that recognizes the importance of printing to it's own business. Remember, you're not just looking for customers, you're looking for good customers. A question like this can also establish it early in the prospect's mind that you're a thinker, not just a "give me something to quote on" printing salesperson.

**Question 2. Is your part of the business more concerned with promotional printing or operational printing?** One of the principles that should always guide you in selling is that people like to talk about themselves. Get that started early, and show that you're concerned with this individual, not just the size of the company's printing budget. This question can also help you establish that there's a difference between promotional printing and a company's internal/operational printing needs.

**Question 3. What kind of products/services does (this company) sell/make/provide?** You can never know too much about a prospect at this stage of the game, and it's been proven in the marketplace that the kind of customers you really *want* are very likely to be people who want you in turn to understand something about their businesses. They recognize that that's how you can be most valuable to them.

If you want to establish yourself as an even more competent salesperson, make it a point to have at least some idea of what a company sells before you go in on a sales appointment. That might lead you to use an alternative form of this question. You might say, "*I know that you sell/make/provide ABC and XYZ...what else should I know about your products/services?*"

**Question 4. Who are your typical customers?** Again, a question intended to broaden your overall knowledge of the company, and to keep the prospect talking. But it's also a part of the process of gauging the size of a company's printing requirements. You'll get good indications of how much they spend on printing in the combination of products and customers. Lots of products and lots of customers will generally translate into lots of printing. Smaller product and/or market niches might mean a much smaller printing need.

**Question 5. How many employees in total do you have? In how many locations? How many of them are sales or marketing people?** The number of employees and locations will help you to gauge a company's internal/operational printing needs. The number of sales or marketing people is another indication of promotional printing requirements.

**Question 6. Is (this company) a market or industry leader? Where would you place yourself in terms of the other players in the markets you serve?** Many salespeople have found success in giving a prospect the chance to brag on his or her company a little bit, especially the smaller businesses who aren't market leaders yet, but want to be.

**Question 7. What are your own responsibilities...to the business as a whole? As far as the printing decision-making process goes?** Your ultimate purpose in asking this question is completely selfish. You want to know if you're spending your time with the real decision-maker.

But in phrasing it this way, you're submerging that critical question within another opportunity for the prospect to talk about himself or herself.

**Question 8. Are there other people in the organization that I should get to know, either now or somewhere along the way?** Another important question asked in a non-confrontational way. There may be others involved in the decision-making process, and/or there may be others who buy printing. You obviously want to know who all the players are. This buyer may be reluctant, though, to put you in contact with any or all of them this early on in the process. You show that you understand that with the second part of the question.

**Question 9. How many different kinds of printing companies are you dealing with now?** It's not at all uncommon for a company to use different printing companies for different types of printed products...basic quick-printer type work, long run/high color, complex or overflow copy work, forms or labels. You go in knowing that the prospect is doing business with other printers, with a goal of gaining at least part of their work for yourself. By establishing that there are different kinds of printing, you set the stage for the contention that you're the best choice for some particular part of their total printing need.

**Question 10. Do you use more than one printer for any category of work?** It's not very reasonable to expect that any prospect is going to throw all of their work your way immediately, especially a company that has a lot of printing to give. It may be easier to displace a secondary supplier than to displace a primary one, and you should be happy enough with that as your initial accomplishment with any prospect.

**Question 11. Are you willing to tell me who you're buying from now?** This can be interesting knowledge, but it's not critical to your success. What's critical is to ask the question in a non-confrontational way. The really important information about competitors comes out in the next two questions.

**Question 12. What do these printers do well? What are the things that you especially value in your relationship with them?** Please understand that it's not *who* the other printers are that's important, it's *how well they service the prospect*. Remember this too...to a certain degree you are asking the prospect to defend his or her decision to be buying from these other printers. You should expect there to be high levels of satisfaction expressed. That doesn't mean that you don't have a chance, as you'll see in just a second.

**Question 13. Is there anything—no matter how small—about your relationship with any of these printers that you'd change if you could?** This is a great question! In fact, since you go in knowing that you're going to have to displace another printer in order to get any business from this prospect, it's fair to say that everything that has happened so far has been leading up to this question. The answer you get here tells you what—if anything—you have to work with in accomplishing that challenge.

**Question 14. Is there any one thing—or more than one thing—that I'd have to show you to get serious consideration for some of your business?** This is really the "closing" question, coming as a strong follow-up to the question that identifies any weakness on the part of the other printer(s) involved. The most important thing for you to do is to listen carefully to the answer and make sure you clearly understand what you'll have to do to ultimately win this customer.

**Question 15. What's the best way for me to keep what we've started today moving forward?** The last question recognizes that you're still only part way there. What you need is the chance to come back and tell this prospect exactly how and why you're a better choice than the printer(s) he or she is already doing business with. Many top salespeople have had success in asking their prospects to guide them as to how—and how fast—that should happen.

Now that you have a list of good questions to ask on a first face-to-face sales call, I'll give you one more piece of advice: Don't expect it to work perfectly for you every time! It's an absolute truth in the business of selling that you can't sell to everybody.

You will run into people who won't cooperate very well, who won't answer your questions in as forthright and honest a manner as you'd like. You'll also run in to people whose answers won't give you anything to work with.

That's all right, though, because while you can't sell to everybody, you'll also never run out of people to sell to. The bottom line is this...if you ask the right questions of *enough* prospects, you'll build all of the business you want!