

# Pre-Call Prep List

The following preparation materials support an Audience-Selling approach.

Audience-Selling approach includes the following preparation steps:

- Prospecting - new business development
- Needs analysis - audience-based
- Proposals - multi-month, multi-offering

## Prospecting for New Business

During the qualifying, first meeting or phone call, manage the conversation toward these outcomes.

- **Demonstrate your knowledge and resources, by bringing information of value to the business owner.**
- Learn something about the person and their business before the meeting -- LinkedIn and Facebook are two great sources to reference.
- Ask one or two questions that would help you prep for your next meeting with this prospect. These questions should be brief, specific and closed-ended. Meaning, they should have simple answers.
  - “Ms. AC&T fuel and propane provider, generally speaking how quickly can you deliver heating oil to one of your residential customers?”
  - “Based on your ability to respond quickly, are you able to take on more of this type of business?”
  - “I’d like an opportunity to share some additional approaches to help you attract more of those types of customers. Would it be okay if we spent a half-an-hour together next Tuesday? I’d like time to prepare some additional questions regarding your ability to serve your customers so quickly and efficiently”
- Find out who the decision-makers are by asking "Who else besides yourself might be involved in the decision-making process?" This person or group of people need to be in your next meeting.
- Ask for a follow-up, 30 minute appoint to dig deeper into what you’ve learned today.

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## Preparing for a Needs Analysis Discussion

Goals for the Needs Analysis Meeting:

1. Understand the following about the business:
  - What customers are most important to this business?
  - What do those customers look like?
  - How do those customers engage with the business today?
  - How would the business like to engage with them in the future?
  - What value does a new customer bring to the business?
2. What is the timing to invest in marketing?
3. What is the budget available to market to their new customers?

Here are six planning questions you should answer for yourself before every sales call:

1. **What is the prospect's current situation?** Ask this question to give yourself the lay of the land. Often your goals for the customer, the value our advertising services, and your action planning for the rest of the sales call, come out of your detailed knowledge of the prospect's situation.
2. **What is my desired next outcome?** If you don't know what you want to get out of your meeting with them, don't walk out the door.
3. **Why would this prospect want to meet with me?** Be specific in your planning, as to why our audience is a great fit for this business' marketing efforts. What do you understand about their business, their current marketing needs, and their future marketing needs?

The more specific, the better.

4. **What are my relative vulnerabilities?** How do we stack up to our competitors? Can I articulate the value of our audience as it specifically relates to this business?
5. **Have I used a variety of sources to inform my understanding of this business?**

Have you reviewed and prepared using?

- Corporate prep report
- Visit Prospect's website
- Visit Prospect's social media: Facebook, Instagram, Twitter
- Visit Competitor website

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- Conduct a Google search using terms most consumers would use to find the business or its products/services
- Pull previous quarter's magazines, papers, event collateral

## 6. Have I prepared my agenda and my 3-5 open-ended questions to use during the discussion?

### Building 3-5 Open Ended Questions

Start with the business' website. Develop at least one questions around the following research.

- How does this business make money, based on what you learn from the products or services they advertise on their website?
- Are there other potential ways this business could make money, that is not promoted on their site?
- Who do they sell to? (women, men, age groups, geographic specific consumers?)
- What do their customers care about? (quality, variety of selection, expertise, guarantees, reputation of the business, experience, local)
- How would you describe this business' unique selling proposition? What makes them stand out from their competitors?

Go to the business' social media page on Facebook. Develop at least one questions around the following research.

- What topics does the business post about of Facebook? Many times, these are topics they believe are of interest to their target customer. (quality, variety of selection, expertise, guarantees, reputation of the business, experience, local)
- What clues do the Facebook posts give you about the level of customer service of the business?
- What geographic areas does this business services?

Go to a known competitor's website. If you don't know who their competitors are, Google a keyword for one of the services the business provides and add the zip code of the business to your search. Develop at least one questions around the following research.

"home heating oil 21740"

- How would you describe this competitor's unique selling proposition? How does it differ from your target's?

Google three questions related to the product or services of the business. Develop at least one questions around the following research.

"Which is better home heating oil or propane?"

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“Is heating oil cheaper than natural gas?”

“How much does heating oil gas cost?”

Use some of the following additional questions to help you understand the main goals of the needs analysis. Those goals are:

1. What customers are most important to this business?
2. What do those customers look like?
3. How do those customers engage with the business today?
4. How would the business like to engage with them in the future?
5. What value does a new customer bring to the business?

When someone calls you about your services? What questions do they typically ask you?

What’s working well with your advertising and marketing? What frustrates you about your current advertising?

We’ve talked through your most profitable lines of business, those that we’d promote to our audience, can you help me what those new sales mean to you?

Other businesses in your position spend \$XXX. Can you talk me through how this aligns with your expectations?

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