KEEPING SALES MOMENTUM

Worksheets

[Click here to go to the article with details on how to use this worksheet.]

KEEPING UP WITH TIME

RIO

Instructions:

Use this worksheet to help you understand the importance of leaving time at the end of your call.

How much time do you need to leave at the end of your call to cover pricing, objections, and next steps?	
At which point during your presentation should you start wrapping things up so that you have enough time to cover anything they need to know in order to take the next steps?	
What is your game plan when you are 45 min into an hour-long call and you realize that you still aren't close to being finished with your Demo?	

RIO

PREPARING TO PRESENT PRICING

Instructions:

Use this worksheet to map out how to walk your prospect through your pricing structure.

Do you usually walk your prospect through the pricing or do you only offer to email it to them later?	❑ Walk them through it ❑ Email it to them
How much time do you need to walk prospects through your pricing and answer any questions that might arise?	
What can you do if they have sticker shock?	

RIO

BOOK A FREE GROWTH SESSION NOW

Instructions:

What are some common questions that come up when you walk prospects through your pricing and how can you handle them?

COMMON QUESTIONS/OBJECTIONS	HOW DO YOU ADDRESS THEM?

RIO

BOOK A FREE GROWTH SESSION NOW

GOING OVERTIME

Instructions:

Use this worksheet to plan out leaving enough time for pricing and healthy discussion.

How much time do you need to leave at the end for pricing and objection handling?	
At what point during your call do you need to check-in with yourself and evaluate if you are on track with your agenda or not?	

RIO

Instructions:

Use this worksheet to plan out leaving enough time for pricing and healthy discussion.

What are some ways you can ask the prospect if the meeting can go over?	
What are some ways you can ask the prospect if you can book another time to talk?	

ASKING INSIGHTFUL QUESTIONS

RIO

Instructions:

Use this worksheet to plan out your “post-demo huddle” with your prospect.

How much time do you want to leave at the end for your “post-demo huddle”?	
What do you want to cover with your prospect during this time?	

Instructions:

Use this worksheet to plan out your "post-demo huddle" with your prospect.

What insightful questions can you ask that will lead them to the next step in the process?

PREPARING FOR NEGOTIATIONS

Instructions:

Use this worksheet to help you plan your negotiation strategy.

How much are you willing to discount your deals on average?	
Brainstorm all the things you can ask for in order to make the negotiation a give and take between you and your prospect.	- Can you ask for a longer time commitment? - More users? - Better payment terms?

RIO

NEGOTIATING WITH YOURSELF

Instructions:

Listen to 3 of your past sales calls. Make a list of other subtle phrases that you use that may detract from the value of your offering.

.

Call 1	
Call 2	
Call 3	

RIO

BOOK A FREE GROWTH SESSION NOW

Instructions:

Use this worksheet to move you away from negotiating with yourself on calls.

.

Do you mention a rate card when you walk your prospect through pricing?	❑ Yes ❑ No
How do you come across to the prospect when you do this	

RIO

ASKING PROSPECT'S OPINION

Instructions:

Use this worksheet to recognize the importance of knowing your prospect's thoughts on your solution before discussing pricing.

Write down some questions you can ask your prospect to understand their thoughts on your solution before walking them through pricing.	
What's an approach you can use to check-in with everyone who is at the meeting?	

RIO

COMPERING YOUR SOLUTION

Instructions:

Use this worksheet to map out some ways to ask your prospect about their impressions of your solution.

Why is it important to take note of the prospect's answers to your meaningful check-ins?	
How will you ask them how your solution compares to your competitors'?	
How will you go around the room and include everyone in your check-in?	

RIO

BOOK A FREE GROWTH SESSION NOW

PROPOSING NEXT STEPS

Instructions:

For each next step, you want your prospects to take, write down the value of each step and note why you are suggesting these steps, along with due dates.

NEXT STEPS YOU WANT YOUR PROSPECTS TO TAKE	VALUE OF THESE STEPS	TIMELINE

RIO

Instructions:

Use this worksheet to explore different ways to ask your prospect how your solution compares with other solutions they are evaluating.

Write down three ways you can ask prospects how your solution compares to other solutions they are evaluating.	
List three to five points in time, during your demo process when you can likely most naturally ask prospects these questions.	

GETTING NEXT MEETING ON THE BOOKS

Instructions:

Use this worksheet to help you get that next meeting scheduled.

Do you always get the next call on the books when wrapping up a meeting?	❑ Yes, always ❑ Sometimes ❑ Rarely ❑ Never
What has typically happened when you have gotten the next call on the books?	
What has typically happened when you haven't gotten the next call on the books?	

RIO

Instructions:

Use this worksheet to help you get that next meeting scheduled.

How can you step out of your comfort zone and ask for a 15-minute placeholder call with your prospect to follow up?	
For you as the sales professional, what's the value of having this call scheduled?	
For your prospect, what's the value of having this call scheduled?	

RIO

APPLYING ACCESS & ACCELERATE MINDSET

Instructions:

Map out your Double Double strategy for your next 2 calls. Remember, It is meant to remind you to always look for opportunities.

.

	Think of a prospect. Who else needs to see your solution?	With your prospect, determine who else should be engaged for your next call. Any cross-functional leaders or other senior executives?
Call 1		
Call 2		

RIO

BOOK A FREE GROWTH SESSION NOW

THINKING LIKE A PROJECT MANAGER

Instructions:

What are some typical tasks that need to be completed as part of your next steps with a prospect? Who needs to complete each of these tasks - you or the prospect?

TASKS THAT NEED TO BE DONE	WHO NEEDS TO DO THEM

RIO

Instructions:

Write out a draft email you can use after every meeting to recap the tasks, the timeline, and who owns each task, and when it needs to be done. Send this email after every single meeting to recap and reinforce the next steps.

Notes:

RIO

BOOK A FREE GROWTH SESSION NOW

Looking to increase your sales numbers?

We help SaaS and B2B companies achieve Faster & Predictable Revenue Growth using a scientific approach.

Click below to schedule a free Growth Audit Session.

It would be my honor to help you scale your company faster.

BOOK A FREE GROWTH SESSION NOW