

SALES BOX

SUPPLIES:

- 1) 3 X 5 card “recipe” box (with flip back cover)
- 2) 2 packs of 3 X 5 cards
- 3) Packet of 3 X 5 tabbed index cards

Purpose: Make it easy to “follow the flow” of your sales activity and stay on top of where you need to put your attention.

Basic Use: Staple business card or write contact information for anyone who is a source of referrals for you or is a new prospect. Track and manage them as follows (from the front of the box moving back). It is easy to see simply by the number of cards in any one category where you need to put your attention. If you have two or three proposals out but no prospects, where should you put your focus?

TAB #1: Network: Anyone who might be a source for referrals or helpful for you in generating new prospects.

TAB #2 Prospect: Someone you have not yet contacted but have identified as a potential client/customer.

Recommended Approach: If you are sure they are the “decision maker” you need to talk to, send them an introductory letter (1 page) introducing yourself, your service and letting them know you will be calling them. Within 4 – 7 working days, call them. Have an offer prepared that gives them a good reason for saying “Yes” to a personal appointment. “I would be happy to give you an hour of time to assess your situation and give you my recommendations. No obligations on your part.” Always have a “back-up request.” If you can’t get an appointment, find out when their current contract is up and ask if you can be on their bid list, etc.

TAB #3 Appointment: Someone with whom you have set an appointment. What research do you need to do about them in order to be able to offer them compelling value? What do you need to bring with you (more complete marketing packet with references, etc.)?

TAB #4 Proposal: Anyone who has requested a proposal for your services. Find out as much as you can about what they are looking for and what kind of budget they have so you can tailor the proposal to fit their situation. Make sure it is easy to read and understand and looks good – no spelling errors or sloppiness in presentation.

TAB #5 Hot: Anyone who has a proposal and that you consider a likely sale. What else might they need to know or have from you to close the sale? Be forthright and convincing without being pushy. If in person with them, “What do we need to do to win your business?”