

steuer gregsson intelligence - managing the sales process

	What's involved?	Client input?	Outcomes?
PROFILING	The characteristics of potential customers or partners are verified, using criteria such as size, location or financial performance to narrow the prospect bank for a more manageable list.	We work with clients to identify the key characteristics of their prospects and help them build an effective profile.	A more refined list of fewer names fitting the criteria that is both more manageable and more cost effective to work with.
REFINING	Data verification and cleaning, such as checking contact details, further research to identify characteristics not provided by automated searches.	We use the profile generated to further refine any data acquired, but we can also work with past data on behalf of a client to provide up to date information.	A cleaned and up to date list, further refined and containing a smaller list of potential contacts that is ready to use.
INITIAL CONTACT	Mail is the preferred method of first contact. With sales it clearly portrays the brand image and removes the need to send information following sales calls. If partnering or acquiring, a well worded letter is usually the most effective way to establish credibility.	A sales approach can require a sustained and regular form of contact, such as a newsletter or bulletin to achieve recognition with the prospects	Brand and image recognition with the prospect making a call more effective and productive.
SALES CALLS	Initial contact by phone to the prospects, following initial contact by post. Initiating these calls after a period of sustained contact by mail to raise awareness will result in more productive calls.	Clearly identified objectives for each call and an understanding of the offer when making the call.	Initial meetings with the potential prospects to discuss your proposition.
BRAND AWARENESS	PR campaigns can be run alongside initial contact processes to further raise awareness and recognition	Noteworthy news stories for PR agencies	Improved awareness and recognition to make an initial conversation more productive
MEETING PREPARATION & BRIEFING	Gathering information before meetings to help identify and understand any possible issues and enter discussions forearmed with clear facts about the potential partner or customer.	Basic details of the prospect.	A concise report highlighting the key facts and points of interest, tailored to the type of meeting. A briefing session to help identify focus areas and the questions to be asked.
BUILDING THE RELATIONSHIP	Debriefing sessions to summarise the points from the meeting, provide further information if necessary and develop a plan to develop the relationship.	Details and notes from the meeting	A clear plan highlighting what will be provided in terms of further information and when; how the contact will be followed up and the time scale for this; and whether there are issues or opportunities that may need input from other sources.

