

## Pre-Call Planning example for Sales Decathlon

<http://salesdecathlon.com/>

1. **Customer:** Marge Fripril, Director Sales Effectiveness, Marg@mckesson.com

### 2. BUYING INFLUENCES-15%

- *Economic Buying Influence (ID person with bottom-line impact and who gives final approval; outline their anticipated needs):*

George Guttit, EVP of Sales; and/or Bill Hardnos, President

George is looking to create more efficiency in the day-to-day processes of the sales team to allow for face-to-face time for representatives to see customers. His opinion is that too much time is spent on training (out of the field) and not enough on selling.

Bill's influence on the decision is not known at this point although his title would indicate that he could be the final decision maker unless he has delegated the authority to George. Since Bill has been named president, gross profit and gross margin have increased steadily reflecting his leadership decisions in several segments of the business.

- *User Buyer Influence (ID person who uses product/solution in everyday operations and outline their anticipated needs):*

Marge Fripril, Director of Training

Marge's primary role is working across the country to create online training modules and develop sales training courses which are conducted in person around the country. She will be partnering with Jim Makenit and will be seeking efficiency in her department, easy to use (and train) for the sales team, and cost effectiveness for the company.

- *Technical Buyer Influence (ID person who ensures product meets company specifications and outline their anticipated needs):*

Roger Turnkey, IT Project Manager. Roger has a BS in computer science and helped negotiate their current contract with WebEx. He is connected with WebEx through a former classmate who presently works for WebEx and is seen as the McKesson expert on the software. Roger however would like more time to dedicate to other IT issues.

- *Coach Influence (ID internal champion who offers guidance, believes in your solution, and outline their anticipated needs):*

Jim Makenit, Director of Sales Effectiveness

Jim is focusing on a new strategy to streamline communications to the sales team which includes providing the team with the right tools at the right time to reach success.

### 3. Customer Concept -15% (What overall issue customer wants to fix, avoid, or accomplish):

McKesson Pharmaceutical Group has had issues with WebEx and may be interested in changing to Adobe Connect. Specific issues have not been uncovered at this time and will need to be clearly identified during our first meeting. The WebEx contract expires April 1.

Additionally, the four regional offices will be our initial focus with both the West and South regions are the heaviest users of WebEx.

**4. Sales Call Objective -15% (Specific business goal seller aims to achieve on call, S.M.A.R.T):**

Fact finding that will include:

- clearly identify issues with WebEx through specific questions designed to gather data;
- confirm regional usage patterns and length of existing WebEx contract;
- identify McKesson's desire for webinars/training sessions, HR interviews, smart phone application for field representatives
- understand McKesson contract process and timeline for decision

**5. Gaining Information -30% (Specific questions to gather data to confirm existing information or identify missing information):**

- What application about WebEx has caused you concern?
- How frequently have the problems occurred in the four regions and what has been the consequence for the sales department?
- What are requirements/applications that McKesson needs in the new system?
- Would McKesson consider transitioning from face-to-face training to webinars to reduce costs?
- Does 100% of the sales force carry smart phones?
- What department would be in charge of the implementation of Adobe Connect?

**6. Anticipated Objections -15% (Specific roadblocks and plans to address concerns):**

- Cost between WebEx and Adobe Connect
- Will new hardware be required?
- Length of contract and how are Adobe Connect future upgrades added to the existing systems
- Learning a new system will be difficult.
- How is technical support handled?

**7. Potential Evidence/proof to bring to call -10% (Support materials/resources to build credibility or influences):**

- Testimonial from other customer, Dammer Boots, who have numerous sales representatives with different technology skill levels
- Pricing guide and timeline of implementation
- Live demo