

## **Chapter Sixteen**

### **4 Step Sales Process**

There are a million different ways for a salesperson to approach sales with their customers and a million different ways that customers respond to those tactics. The point of the 4 step sales process is to provide a simple but highly effective base guideline for your sales team to follow so that they can better engage with your customers and help drive sales as a result. This process works great when teaching those new to a sales environment, but can even the most experienced salesperson could use a refresh on these topics to stay on top of their game. The four steps are Greet, Qualify, Recommend, and Close and we will look at each one individually in this chapter. Your role as a leader is to teach these steps to your sales team and help coach them on how to improve using the following information. Remember you cannot be mad at someone for not hitting sales goals if you haven't given

them the tools to succeed in selling to your customers and not everyone is a talented natural born salesperson and needs to be coached on this as a learned skill.

### **Step 1. Greet**

Whenever you are dealing with customers in any sales environment you should always be the person who initiates the contact and greets the customer. When you walk up to the customer in a non-confrontational manner and greet them with a smile and your name and if comfortable offer a handshake to start off the interaction. The sales process goes a lot smoother when you are the one to initiate the conversation and offer your assistance vs them having to find you and ask for help. When you greet with name it should look something like this. “Hello, my name is John, what brings you in today?” or “Hello, my name is Sally, I see you are looking at our appliance sale, how can I be of assistance?”. These are very non-confrontational and are not pushy with a what can I sell you but more open ended and will be more likely to engage in a further conversation. If your employee is not the person

to initiate the contact, they can still save the greet step by apologizing for not being readily available and then roll right into a positive opening statement along with their name to again make it more personal. Either way when you offer your name you make it more reasonable for them to give their name and you can then refer to them by name for the rest of the process whenever possible. Imagine the difference of if you were to introduce them to a peer or a decision maker in a sales process and you say, “this customer is interested in...” vs how it would sound if you were to say, “Mr. Jones here is in the market for a new...”. This step cannot be faked and when you greet you must do so with sincerity or the customer will be able to tell and will be turned off if they feel you are greeting them off a scripted process. I like to tell my salespeople to have a few go to greetings and tailor them to the type of customer they are going to engage so they have a higher chance of creating a bond and engaging in further conversation. If you don't get into an engaging conversation your chances of a great sale are going to be greatly diminished.

There are times when the customer refuses to engage in conversation from the start and is “just looking” today as they like to say. Whenever you get that answer your team needs to be able to overcome the obstacle and stay engaged while not overpowering. The best response to this just looking answer is “That’s great, I’m glad you decided to stop by today and take a look at what we have to offer. My name is John and I wanted to make sure you know I am here to assist you whenever you do have any questions.” If you have a sale running or a value proposition to throw at them at this time sometimes that can help initiate the conversation from them that will turn into a conversation even though they originally declined it. I have used this many times with my team in an appliance or flooring sales area where I would coach them to then say “I just want to make sure you are aware of the big sale we are running that is ending today (or whenever it is ending) and how it works. If you look at the price tag you can see the original price as well as the sales price so you can take a look on your own as you are looking through the showroom, but what the sign doesn’t say is that we offer free delivery, free installation, free haul

away, 12 months no interest on our credit card as well as our price match guarantee that we will meet or beat any competitor out there and we can even pull up prices for you online to prove we are the best before you make a decision. Feel free to take a look around and I'll be right here when you have any questions.”. You would be surprised at how many people would hear all the great things they were not aware of in that value proposition that would then start asking questions about a part of the sale and how to take advantage of it even though they had just said they don't want help and we had just told them we were going to give them the space to shop as they had requested. If they still don't engage with you then give them space and, in a few minutes, feel free to reengage and offer assistance again. Whatever you do, don't hover! Give them the space they need but stay visible and straighten a shelf or dust an item off so they see you giving them the space they wanted but still available to them.

As the leader your role in this is to help them practice. You can role play, you can give them live customer examples, you can have them write out a list of 50 different ways to say hello and

initiate the contact but whatever you do you need to make sure they are comfortable and confident when you put them out in front of your customers. If they are super green at sales a fun challenge is to send them out into the store or even to a mall to go hand out flyers and to practice greeting as they hand out the flyers. Don't allow them to come back to discuss how the exercise went until they have handed out all the flyers that you have given them and if available watch from the background to make sure they are actually trying to use the training you gave them and are doing more than handing them out and just saying hello. This exercise is easy and will break the ice before moving on to the next step that is quite a bit more involved.

## **Step 2. Qualify**

When you have gotten past the introductions and you have them willing to engage in conversation you then move on to the qualify step. In the qualify step you need to ask as many questions as needed to truly determine what product or service the customer truly wants for the final outcome of the purchase. Your salesperson should be focused on the customers

true wants and needs and not what products they can push onto them as this will be obvious to most customers if you are not acting in their best interest. Imagine walking up to the salesperson at a car dealership and you tell them you are there to buy a decent used car for your daughters first car and they try to talk you into going over to look at a brand-new car that they can get for a similar price. You may or may not be interested in the new car even at a great price, but I am sure you would not be happy that the salesperson shut down what you told them you wanted without even asking any qualifying questions such as budget, mileage, color, transmission, etc... You would be a lot more open to the conversation of the upsell on the new car if they had engaged in some conversation and asked what your daughter's name was, whether or not she played sports or any extracurricular activities, if she would be carpooling with others, if you had a budget in mind for payment, etc... Your sales team needs to start with get to know them questions and then engage in conversation as they ask the remainder of the questions. Your salesperson cannot just rattle off a list of questions and get to a recommendation, they

need to engage in an actual conversation between questions, so it feels like a two-way dialogue and not an interview or interrogation. You need to find out why the customer intends to make this purchase, the “why” can come into play greatly as you look to make your recommendation in the next step by making that recommendation custom tailored to solve the problem or meet the need that the customer has in their mind. You also need to find out timeframes as to their purchasing decision and when they need to make the final decision or receive the product or service, so you can again use that when you make your recommendation in the next step.

Your role as the leader is to make sure your sales team is genuinely interested in the customers purchase and is treating them with respect in their conversation. You need to help them practice qualifying a customer with both role plays where you pretend to be a customer with them as well as observations of real life customer interactions. I have found it fun to make a game of this step in training with sales people by having a profile of who I am as a customer typed up and ready to use so I can checkmark each item the salesperson asks me

about and then see if they use those facts to make the recommendation to me more personalized. If you are able to turn over a paper at the end and show them how they could have used specific facts about you as a person or specific facts as to the who, what, when, where, why of your purchasing decision to make it easier then it makes it easier for most new salespeople to understand and tie these facts to an ability to sell when they see it on paper. You can then ask them what your profile person's name was, why they are in looking to make a purchase, how old the item they are looking at replacing is, whether or not there was a timeline for needing this product, etc.. Once you have coached your team to ask questions with what I like to call a "natural curiosity" where the questions flow naturally in conversation then you have achieved success in this step.

### **Step 3. Recommend**

This third step of recommending a service or product is extremely important and the success rate will rely on how well you executed the first two steps of the process. You want your team to be able to recall personal facts and answers that

the customer gave them in the inquiry step so that you can make a personal recommendation that the customer feels is in their best interest and not your salespersons best interest. You want the conversation at this point to come across to where you are stating back to the customer reasons why the recommendation you are making is why it is best for them and what they truly want and providing the best value for their money. For an example let's use the used car purchase again and see how involving personal details can make it an easier conversation. I would want it to look something like this "Well Mr. Jones based off what you've told me I'm positive we have a car that will fit your needs and the needs of your daughter. I really feel like the best option for you both would be to look at one of our new base model cars due to the fact that you would have a full 5 year warranty included at no extra cost so you would have the peace of mind while your daughter is out on the road and still be well within your budget of \$200 a month if we choose one that has been sitting on the lot for a while that I know my manager would be willing to make a deal on. Plus, we have better financing options and rebates available to get the

payments even closer to what they would be on a used car that are only available on the new models through our branded finance department. We can still take a look at some of our used options if you would like but when I think about your concerns such as future trade in value, low mileage, warranty, and safety features I know you would be happier with the new car.” This recommendation was not pushy and used reasons that the customer had told you were important to them in making their purchase. You also left the door open to looking at the other option of the used cars but put some reasonable doubt in their mind as to why bother with the used car if it won’t meet as many needs as the new car would. Now on the flipside if after you spoke to this customer and based off the inquiry step you determine the used car is the best option for them based off their desire for a cash out the door price or very low monthly budget, the fact that they wanted lower insurance premiums, the fact that they know the daughter is a bit reckless with parking and they don’t want to worry about her scratching it up and hurting the value then your salesperson needs to make the recommendation for the best used car for their needs. This would

look something more like this “Well Mr. Jones based off what you’ve told me I’m positive we have a car that will fit your needs and the needs of your daughter. I really feel like the best option for you both would be to look at a used 4 door sedan due to the fact that your daughter will be carpooling her siblings and you will definitely get cheaper insurance rates on a 4 door as well. We do offer an extended warranty option that we can have added on to give you peace of mind while your daughter is out on the road and still be well within your budget. I have a great low mileage trade in that just came onto the lot this week if you would like to follow me right this way.” This was again very low pressure and addressed their concerns and the reasons why this customer is looking to make the purchase in the first place. The customer will feel at ease knowing you are addressing their needs and not yours and still gives you the chance to add on the extended warranty to meet the customers desire for a reliable form of transportation. Whatever you do in this step make sure your team follows their recommendations based off what the customer wants and ties what they recommend to those reasons. It is ok and actually suggested

to ask the customers if they agree that these were the right needs you are meeting with the recommendation before moving on as if they agree then you can know you have them on the hook with the right product or service. Make sure to never sell with your own wallet or based on what your salesperson feels is expensive. I assure you there is nothing in this world sold anywhere that is “expensive” just different items for different budgets. I have sold \$65,00 bathroom remodels that I would never ever do in my own home but it was what the customer wanted and met their needs so we presented the offer and they were happy to make the purchase. If I would have made the recommendation and sold with my own wallet we wouldn’t have met their needs and they would have went with someone else who would sell them what they wanted.

Your role as the leader for this step is to continue along with the role plays and real life observations to see if your salesperson is using facts to base their recommendation on and if they can effectively tie them together with confidence in the suggestion. Your role is also to help them overcome objections and get back on path if the customer does not like the recommendation for

any reason at all. If the recommendation offered is truly the best option for the customer, then you need to reinforce why this is the best option and if they still object then take it off the table and move on to the next solution or offer for this customer. Any sale is good for business as long as the customer is happy and would return and recommend you to their peers especially in this social media friendly world that we live in today where your good or bad service can and will be known by all within seconds of pulling out a cell phone to post a review. You want your team to act as if every interaction is going onto their own personal brand website and that the suggestions they make are truly the right ones for the customer. Don't force a higher price or fancier option on the customer if they don't want it or you will be violating the rules of this process and won't get the opportunity to move on to the 4<sup>th</sup> step to actually close the sale.

#### **Step 4. Close**

This is sometimes the hardest step in the process because it involves you physically asking the customer for their hard-earned money and to commit to making the purchase with you.

Why this is hard is a mystery to many but I've found from experience that people like to sell from their own wallets and would themselves be uncomfortable pulling the trigger on the purchase many times due to a price they feel is "expensive". I want you to make sure that your team understands in this step there are a lot of ways to fail and only a few to be successful. If your team is going to be successful they need to be confident in their conversation which should be easy based off them making the proper recommendation based off the right inquiring questions. The salesperson needs to take that confidence and present the offer to the customer and then "assume the sale". Assuming the sale is basically assuming there is no other option for the customer other than saying yes and making the purchase. Your salesperson should say to the customer something along the lines of "I appreciate you coming in today to shop with me and giving me the opportunity to serve you. The total for what you've got picked out is going to be \$xxx and I can get you checked out right here and on your way as quickly as possible. How will you be paying for this today?". You didn't ask them to say yes or no, you assumed the sale and

you asked for payment! The number one mistake other than selling with your own wallet is to not actually ask for the sale. Imagine the difference in conversation if it went without assuming the sale “I appreciate you coming in today to shop with me and giving me the opportunity to help you with your project. The total for what you’ve got picked out is going to be \$xxx, is this something you would like to move forward with?” Now you have opened the door up to indecision and gave them a chance to say no, or that they want to go home and think about it which you should know has a low conversion rate of returning to actually make that purchase. When you assume the sale you assume they have already agreed based off your conversations and meeting their needs and you know that this is the right thing for them. They can still say no or let me think about it as they would if you hadn’t assumed the sale but when you make the decision easy for them and just ask for payment the customer is more likely to just move forward and make the purchase if it truly does meet their needs. People do not like to make decisions and if you don’t agree with that think back to the last time a group of friends had to decide on what to

do or where to go eat! The first person to make a suggestion generally wins as everyone else finds it easier to just agree and go along than it is to have to make a decision on something else. Be confident and ask for the sale!

Something that is a great thing to add to this chapter is using “Value Propositions” when closing the sale. A “Value Proposition is when you explain to the customer why going with you on the project regardless of pricing is the best thing for them to do and spells out any other value-added benefits you offer that maybe your competition does not. A great value proposition could be available financing for an installation of the product you are selling especially if you offer any no interest terms along with that financing. Sure, they could use a competitor that may be slightly cheaper but isn’t the ability to finance it with you and have no interest for 12 months worth the value added? What about things such as using licensed, bonded, insured and 50 state background checked installers for that same job? I would sure want to know that the people I am letting into my home are safe to be there and that is definitely a value-added proposition if the competition does not offer the same. Maybe your location has a built in 2-year warranty when the industry standard is

just 1 year, doesn't that provide value? I would urge you to come up with what value-added propositions your sales staff could use to close the sale and add extra "value" to use you for the purchase without adding additional costs. Use these "value propositions" to make yourself stand out from the competition and put peace in the mind of your customers.

Your role as the leader here is to make sure that your sales team is fluently comfortable asking for money and able to overlook any price point as an expensive option. You need to help them practice, and practice, and practice again closing the sale as if you do all the great things before this step and you don't actually collect any money then what's the point of it all and you are for sure not going to hit your sales goals without it. Role plays are valuable here and I strongly suggest you throw different objections at them even if they do assume the sale properly and eagerly await your approval. This will happen and the way they handle the objections will determine if they should be in a sales role or not. Can they pull back details and reasons for why this option truly does meet the customer's needs? Can they provide a tangible reason why the customer should buy with you vs a competitor? Can they put a sense of urgency on making the decision

today before the customer leaves? Make it simple on your team and your customers, take away decisions and assume the sale.

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