

# Preparing to Sell

## 1. Knowledge

- 1.1 Product
  - 1.1.1 Purpose
  - 1.1.2 Features
  - 1.1.3 Market position
  - 1.1.4 Pricing
- 1.2 Customer
  - 1.2.1 Users
    - 1.2.1.1 Profile 1
    - 1.2.1.2 Profile 2
    - 1.2.1.3 ...others
  - 1.2.2 Loyalty
    - 1.2.2.1 Reasons for staying
    - 1.2.2.2 Reasons for leaving
  - 1.2.3 User groups
- 1.3 Market
  - 1.3.1 Requirements
  - 1.3.2 Competitors
  - 1.3.3 Activities
  - 1.3.4 Trends
- 1.4 Territory
  - 1.4.1 Geographic area
  - 1.4.2 Market segment
  - 1.4.3 Customer segment
- 1.5 Selling
  - 1.5.1 Selling cycle
  - 1.5.2 Prospect ratio

## 2. Meeting your quota

- 2.1 Strategy
  - 2.1.1 History
- 2.2 Forecast
- 2.3 Track progress
- 2.4 Action needed?

## 4. Toolkit

- 4.1 Company background
- 4.2 Product benefits
- 4.3 Press releases
- 4.4 Customer quotes
- 4.5 FAQ's
- 4.6 Price list
- 4.7 Promotional materials
- 4.8 Product demos
- 4.9 Idea
- 4.10 Idea

## 3. Setting targets

- 3.1 Activities
  - 3.1.1 New business
    - 3.1.1.1 Daily
      - 3.1.1.1.1 Number of cold calls
      - 3.1.1.1.2 Number of meetings
      - 3.1.1.1.3 ...others
    - 3.1.1.2 Weekly
    - 3.1.1.3 Monthly
    - 3.1.1.4 ...others
  - 3.1.2 Existing business
    - 3.2.1 Revenue growth
    - 3.2.2 Market-share growth
    - 3.2.3 Territory growth
    - 3.2.4 New customers
- 3.2 Results
  - 3.2.5 Existing customers retention
  - 3.2.6 Account product expansion
  - 3.2.7 Customer satisfaction
  - 3.2.8 Customer referrals