



Practice Activity

The Sales Success Strategy Checklist

Objective:

Use this checklist periodically as you review your sales opportunities. Each section will help you assess and reinforce the strategies and habits that contribute to consistent success. Set aside time to reflect on areas like client engagement, value alignment, and feedback integration to ensure your approach remains effective and adaptable.

Instructions:

1. Utilize the Sales Strategy checklist for effective sales.

Utilize Time Blocking for Focus

Assign specific time slots for similar tasks (sales calls, admin, planning).

Prioritize client-facing activities during peak hours.

Include breaks but ensure all key tasks are scheduled.

Leverage the MTA Tool for Your Business Goals

Use the MTA Tool to set clear weekly and monthly goals.

Focus on high-value activities; delegate low-priority tasks.

Plan extra time for unexpected tasks.

Apply the Qualified Prospect Formula® Elements

Align solutions with a buyer's problems through a Differentiated VisionMatch™.

Demonstrate both Business Value (ROI) and Personal Value to the buyer.

Identify and engage decision-makers with purchasing authority.

Use the ValuePrompter® to Structure Sales Conversations

Capture key insights: a buyer's problems, solutions, and decision criteria.

Track progress across conversations by documenting next steps and outcomes.

Use the ValuePrompter® to maintain focus on critical sales areas throughout the process.

Master the OPC Questioning Process

Ask Open Questions to encourage your prospects to share insights (What challenges are you facing?).

Use Probe Questions to dive deeper into specific issues raised by your prospects.

Confirm understanding by summarizing responses with Confirm Questions (So, you are saying that...?).

Identify and Align Personal and Business Value

Uncover Personal Value by exploring the buyer's goals (e.g., career growth, recognition).

Demonstrate Business Value through key metrics like ROI, cost savings, and time-to-market improvements.

Shift Conversations from Price to Value by focusing on long-term benefits.

Identify and Engage Key Decision-Makers (Power)

Ask open-ended and probing questions to uncover all decision-makers.

Employ Triangulation by validating information with multiple sources.

Leverage Referrals and Introductions to build immediate trust and credibility.

Use Campaigning to reach out to prospects with a scheduled cadence.

Ensure access to Power with the Return Ticket strategy: Planned and Conditional Access

Establish Mutual Plan Objectives

Confirm the Differentiated VisionMatch and Value based on prior discussions.

Outline the timeline with all necessary steps for your customers to realize their expected outcomes.

Use the ValuePrompter® to frame open and probe questions about your prospect's timeline and decision-making process.

Draft the Mutual Plan as a written document summarizing key points.

Define Negotiation Goals

Identify what a successful outcome looks like for both you and your prospect.

Determine which elements (price, terms, deliverables) are negotiable and non-negotiable.

Present options that meet both parties' interests to achieve a win-win agreement.

Set Revenue Objectives

Define your annual revenue goal and required sales based on average deal size.

Break down goals into quarterly and monthly targets for manageable tracking.

Calculate pipeline needs based on your close rate to ensure sufficient opportunities.

Gather and Implement Feedback

Utilize effective methods to gather feedback, such as surveys and open-ended questions.

Analyze feedback for common themes and prioritize actionable changes.

Communicate improvements to customers to build trust and long-term loyalty.

When you're ready, return to the e-learning module to continue your learning journey.