AudIT Presentation Outline

1. Introduction
2. Sales Cycle
   - Prospecting (1st Meeting)
     - Relationships
     - Referrals
     - Cold Calls
     - Personal Introductions
     - Existing Customers
   - Warm Up (1st Meeting)
     - Get to know them
     - What matters to this person?
     - Are the decision makers at the table
     - Through conversation get them comfortable answering your questions. LISTEN
   - Fact Finder (1st Meeting)
     - Get as much information as you can.
     - If you have a few day's notice before you meet send them the financial and software sections for them to complete before you get there. Have them return it if possible.
     - Identify the PROSPECTS concerns and build your AudIT presentation around those concerns.
       - Don't get sidetracked with what you think is important.
   - Present the Need (2nd Meeting)
     - Present the Baseline AudIT Presentation.
       - I've customized each presentation around our offerings and membership plans. The higher-level membership plans turn more boxes green.
     - Know your client to determine how much detail to provide.
     - Ask the prospect which areas mean the most to them.
   - Confirm the Need (2nd Meeting)
     - "If I could show you a solution to address ___________, ___________, and ____________ (their concerns) would that be something you would want to integrate into your business? I'd like to walk you through our ______________ membership or service."
     - DON'T GIVE THEM MORE THAN THEY WANT. SOLVE THE PROBLEM AND CONCERNS THEY HAVE RIGHT NOW.
   - Present the Benefits (2nd Meeting)
     - Present the Proposed AudIT Presentation
       - Point out the areas they told you they are concerned with and sell on your services to resolve their concerns.
   - Close (2nd Meeting)
     - "Do you feel this solution solves the issues and concerns you're dealing with? Do you have any additional question or concerns?"
     - Have your quote ready for them to sign.
       - I like to get a quote signed initially and send the Service Agreement via DocuSign.
   - Warm Down (1st and 2nd Meeting)
     - Discuss the process moving forward
       - Timelines, expectations, etc.