



# Workbook

**Handouts, Worksheets,  
and Checklists for  
Selling With Confidence**

Pat Helmers V1.2

# HEAT Selling Skills Assessment

Do you have what it takes to be in sales? Let's see!

On a scale of 1 to 5, with 1 being poor and 5 being excellent, where would you rank your selling skills?

**1**                      **2**                      **3**                      **4**                      **5**

Master Sellers have HEAT. Complete examples on the back side. Write the word each letter represents. Score yourself.

H \_\_\_\_\_

E \_\_\_\_\_

A \_\_\_\_\_

T \_\_\_\_\_

Sum \_\_\_\_\_ /4 =

## Assessment

Review you score. Most sellers are in the middle, between 2.5 and 7.5. See the possibility of becoming successful in sales with your existing skill set. You already have what it takes.

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For each of the following share examples

.

## Helpful

Where are you helpful in your life? Also, name one recent example.

## Emotionally Intelligent

Name an example where you read someones body language and that they were not sharing fully their thoughts.

## Astute

Name an example where you saw a solution to a problem others did not

## Tenacity

List examples in your life where passion drives you to focus and be persistent

## How To Discover Your Ideal Client

The best way to discover what makes your customer tick is to ask them. Using market research techniques to “study the market” sounds intimidating and often skipped. But in reality, it’s not as hard as it sounds. Let me prove it. This guide will teach you a simple process for discovering your ideal client’s needs and desires.

This is a cost effective way of obtaining what they think and the actual keywords they use. The keywords in this language will be leveraged for marketing materials, emails, cold calls, websites, customer support language and actual product enhancements.

### Research Questions

Find 3-6 people who you believe best represents your ideal client. Ask the following questions to better identify the challenges they face. If you can understand their problems, you can create products and services that will meet their EXACT need. This stops all guessing!

What is your (or your business's) goal?

What is your biggest challenge?

What would it take to overcome these challenges?

What would it mean to you to overcome these challenges?

### Interview Process

These questions should be asked in this order. First understand their overall goals. Then dig into the problems that immediately come to mind. These problems create pain. By asking how these problems manifest in their business, you **ratchet up the pain**. By reminding them of their unhappiness, you raise the emotion level and desire to **take action** quickly. The last question then creates possibility and hope.

Why go to the trouble and ask all these questions? Solutions you offer are more readily accepted, once you’ve laid the groundwork of these questions. Your prospects are now viscerally feeling the strife in their life. They are looking for a way out. You can help!

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## Research Guidelines

When asking the questions it's important to remain unbiased. Don't assume you already know the answer, don't lead the answers in any and to the best of your ability, get them to speak as honestly as possible. This data is critical for you to become a persuasive seller

Be patient! Give them plenty of time to answer and once they answer keep digging by saying: ***“what else? what else? what else?”***

The “what else” is pretty powerful. You'll be surprised by the deep and insightful information they share .

**Ask the following and document their answers:**

What is your (or your business's) goal?

What is your biggest challenge?

What would it take to overcome these challenges?

What would it mean to you to overcome these challenges?

## Market Research Study

Using Market Research to evaluate the viability of your good or service is a step often skipped when rolling out new products. Making a few cold calls to collect the thoughts of prospective clients is a cost effective way of obtaining the language of your ideal client. This language can be used for marketing materials, emails, cold calls, website, customer support language and actual product enhancements.

Market Research is generally focused two primary goals:

1. Discover if there is a market for a product or service.
2. Understand how people perceive a product or service and if they see value.

Sometimes it only takes a dozen phone calls to see if you're on the right track to launch a product or solution.

## Filling in the Script

Pull together the following information. Think about the reason you're calling and what you would like to share with the prospective client. It doesn't need much, just something to kick off a conversation. Then you're on your own.

Complete the following.

- Your name
- Your companies name
- Your target industry
- An existing client's name or project you're excited about

The goal is to authentically call them with the desire to share a topic they will find interesting. This is the key to non-pushy sales calls.

## Build Your Custom Script

Fill in the blanks using the reason collected above. The blanks correspond with the data

Hi this is \_\_\_\_\_

from \_\_\_\_\_

I'm doing a research study on \_\_\_\_\_

What is your (or your business's) goal?

What is your biggest challenge?

What would it take to overcome these challenges?

What would it mean to you to overcome these challenges?

*(Repeat with no more than 5 questions)*

Thank you, I really appreciate your help.

## Preparing to Start

Before you start, remember to read the script 10 times out loud.

- Get very comfortable with the words.
- Anticipate the words before you say them.
- Standing up, projects a more confident sound in your voice.
- Smiling, can actually be heard by the listener. Smile when you speak. Ooze positivity.

This may sound silly, and this may sound fake, but it works. People will be more receptive to your questions.

## Get right to the question!

Don't ask permission to ask your questions. Instead get right to it. If it's a topic they care about, people are surprisingly helpful. It's not often people find a sympathetic ear.

The person you speak to may not be knowledgeable about the subject. They may tell you that you need to talk to somebody else. Kindly ask them if you could forward your call to that person. If they can't, try to get that person's name and phone number.

Then call the recommended person saying "*So and So said I should call you....*"

## Be Honest

If they ask why you're doing the survey, be honest with them. Tell them you're a company or organization that's looking to enter a market. You're trying to understand what it will take to be successful.

If they ask you how long it will take, say 1 minute tops. I'm not a fan of asking dozens of questions. You should be able to get through 6 questions in a minute.

## Open Ended Questions

When you ask an open ended question, fully allow them to answer. **Do not interrupt!** Write down the exact words they say. You will use these words later when connecting with new prospects.

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## What Else

Once the question has been answered, restart the answer by asking “**What Else?**” As before allow them to fully answer. Continue to ask “what else” until they have nothing more to say. You’ll be surprised by the great answers this question will generate.

## Mining For Information

The best way to know if there is a market for your products and services is to ask it! Mind reading is not a valid strategy. Good luck!

# Avatar Analysis Table

After interviewing prospective clients in your market niche, collect the data in the table below. Use the keywords in their language. This will allow you to identify them as one collective niche of fears and frustrations. This is your Avatar. Some say you should have a face, gender and voice attached to this model. Your call.

People will pay for products and service that solve their problems. The better you understand their motivations, the faster you can provide value and make sales. Learn to speak their language, and they will buy from you.

## Research Data

Using the answers from the Avatar question, list the following for each interviewee.

Interview Guest	Name	Name	Name
Issues Here			

## Features and Benefits

Now that you have your Avatar defined, its time to look at the features and services you hope to provide. Let's do this from your prospective clients point of view. Answer the question for each feature: *"How do my clients benefit from this feature?"* Not only must your clients benefit from your offering, but it should be clearly tied to an issue they have e.g. frustration, fear, hope or desire. If you can't address an important set of their issues, you don't have a business.

### Feature Benefits Map

Using the answers from the Avatar Analysis table, enumerate the benefits and issues addressed by each of your product's or service's features.

Features	Benefits	Issue Addressed

## Problems Your Business Solve

Customers only buy products and services from companies that can add value. If you don't address a fear, frustration, want, or desire with the solutions you provide, it's time to relook at your business model. With that said, most likely you offer relief and opportunity. Let's discover some details about your solutions.

### **Consider your ideal client.**

List 5 or more problems your company can solve in the buyer's mind, and why.

1.

2.

3.

4.

5.

## Competitive Analysis

Now that you have your features and benefits defined, it's time to look at the competition and see how you compare. Answer the questions in regards to your features:

- How do you compare feature by feature?
- How do your benefits compare to the competition?
- Does your competition have a way of adding value that's different than you?
- Or is it the otherway around, do they have gaps in benefits they provide?
- Where are the gaps, both yours and the competition?

These are the questions we answer when applying competitive analysis.

## Compare Your Value in Detail

In the table below list all your features on far left column. Also list features you *DON'T* have that your competitors do offer. Under each of the columns rank each feature on a 3 point scale:

1. Basic functionality, bare minimum
2. Adequate functionality, works in most cases
3. Extraordinary functionality, the best or near best in the market

Of course if you have no functionality, you should enter a zero. At the bottom of the table. sum your rankings to provide a sense of how you compare.

## Leverage Your Strengths

Once you find your strengths, you will promote these when you meet with clients. This table allows you to be prepared with answers on gaps compared to the marketplace. The best defense is an offense.

The information here will be used to create a set of questions that persuade and solicit interest in your business. Awareness on how you add value in the marketplace will reap rewards as you compete head to head.

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## Feature Comparison Map Across Competition

Using the answers from the Features Benefits table tgo populate the features column.,

Features	You	Competitor A	Competitor B
Total			

## Building Your Value Prop

In this exercise we will build upon your completed market research and analysis work. You will construct one unifying description that will motivate clients to buy. It's called a value proposition (commonly referred to as a value prop).

This description will explain how your products and services address your ideal clients wants and needs. It will also frame the benefits you provide and why they will find value in your solutions. This is how we start using your client's language.

### Framework Questions

Use this worksheet to document a coherent statement of value. Answer the following questions:

- 1. Who is your Ideal Client?**
- 2. What is the primary “thing” you provide your ideal client?**
- 3. What is the primary benefit the “thing” provides your ideal client?**
- 4. What is the primary pain or desire your ideal client experiences?**
- 5. Why would someone pay you for your product or service (what is it's value)?**

## Value Prop Script

Take the answers above and create your value prop by placing the answers in the corresponding blanks. For example, the use the answer to question #1 to complete the first sentence.

\_1\_\_\_\_\_ is my ideal client

and they experience \_4\_\_\_\_\_.

I provide \_3\_\_\_\_\_

through the \_\_2\_\_\_\_\_ I provide.

My ideal client values our \_2\_\_\_\_\_

because of \_\_5\_\_\_\_\_.

## Pitch Question

Do you experience \_4\_\_\_\_\_ in your business?

This can be used to pitch your product or service: in person, cold calls, voicemails, and emails.  
Good luck!



# Cold Call Script

Cold calling is a methodical process. Once you know the process you can repeat it with confidence and aplomb.

You should be focused on one, and only one task, *setting an appointment*. Don't try to sell over the phone during a cold call. You're better off to have a time set aside to have a rich conversation with your prospective customer. You want their full and undivided attention.

The cold call's sole goal is to perk their interest and get them agree to meet at a later time. If you can do this, you're a success.

## Find a Reason

Pull together the following information. Think about the reason you're calling and what you would like to share with the prospective client. It doesn't need much, just something to kick off a conversation. Then you're on your own.

Complete the following.

- Your name
- Your companies name
- Your industry
- A client's name or project your excited about

## Build Your Custom Script

Fill in the blanks using the reason collected above. The blanks correspond with the data

Hi I'm \_\_\_\_\_ from \_\_\_\_\_ .

We do work with \_\_\_\_\_ .

The reason I'm calling is we just completed an exciting project for \_\_\_\_\_ .

I'd like to tell you about the success we've had with them.

Do you have sometime we can talk?

## IMPORTANT:

Remember to read the above script 10 times out loud. Get very comfortable with the words. Anticipate them before you say them. Standing up projects a more confident sound in your voice. Smiling can actually be heard by the listener. Smile when you speak. Ooze positivity. This may sound silly, this may sound fake, but it works.

### Build Another Custom Script

Fill in the blanks using the reason collected above. The blanks correspond with the data

Hi I'm \_\_\_\_\_ from \_\_\_\_\_ .  
And I know a lot of companies in \_\_\_\_\_  
are struggling with growing revenue,  
only 3% over the last year,  
And I've got some ideas that can make a significant difference.  
Do you have some time we can talk?"

### Build A Follow Up Script

Fill in the blanks using the reason collected above. The blanks correspond with the data

Hi I'm \_\_\_\_\_ from \_\_\_\_\_ .  
We met at the \_\_\_\_\_ and  
we chatted about \_\_\_\_\_ .  
And I've got some ideas that can make a significant difference.  
Do you have some time we can talk?"

## Listen

After the final question. Listen listen listen. It's important that you let them express all of their questions and concerns. Then respond accordingly.

## Call To Action

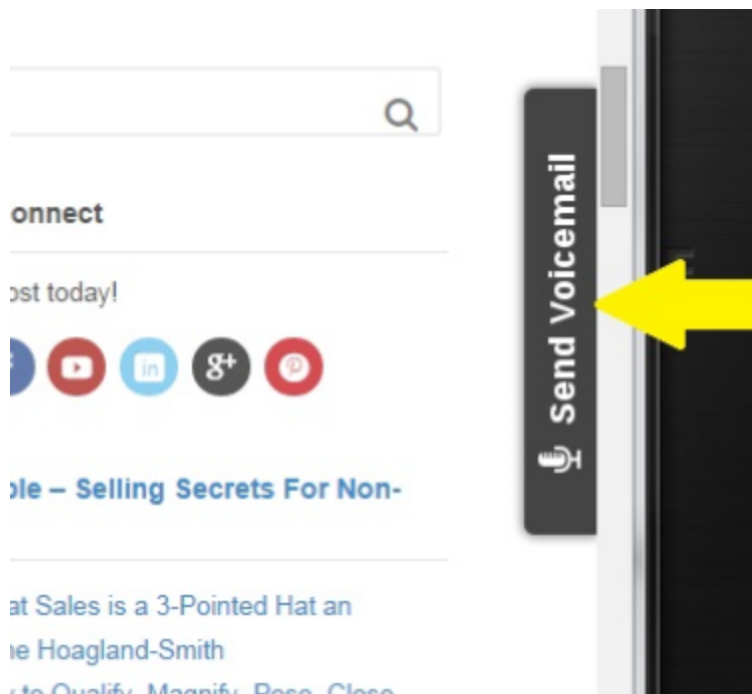
Always finish up any of these scripts with a call to action  
*“Do you have time to meet on Friday, say 10 AM?”*

It doesn't matter the day or time. Whatever time you pick will probably not work. So pick a time and be prepared to set another date.

## Assessment

Let's assess how you're doing:

1. Write out the above scripts and place them in the Selling With Confidence Facebook group for all to review and comment
2. Leave your cold call message for Pat on the “SpeakPipe” tool on SalesBabble.com



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## Compelling Voice Mails

Voice mails are a great opportunity to share and solicit interest in your products and services. You're not necessarily promoting any one thing explicitly. Instead you're trying to get them interested in sharing a conversation about their issues and desires.

Most people listen to their voicemails.... unless they're too long. You only have few moments of their patience. Use that time wisely.

### **Voicemail as a Radio Ad**

Your task in this exercise is to build a series of voicemails that you'll leave when cold calling prospective customers. The goal is to create interest in the listener and have them return your call for a further conversation. More likely than not, it will require another call to actually set up the appointment. These things take time.

Think of these voicemails as micro radio ads. You only have a few seconds. It must be so compelling they are moved to action. Setting up an appointment is the goal of your voice mail.

### **Keep In Mind**

The person you're calling is a busy person. They have many balls they are juggling all at once. Your voicemail must stand out among the noise. It's important that you make it clear, concise and relevant. If you do not add value to their life, they will delete your voicemail.

What you have going for you is this: most people listen to their voicemails. Unlike email, there is no spam folder. This is a unique opportunity. Use it wisely.

### **Exercise**

For each of the templates below, fill in the blanks per your specific business. Use your market research for guidance.

## Your Voicemail

Fill in the following template.

Hi \_\_\_\_\_

I'm \_\_\_\_\_ from \_\_\_\_\_, we do work with \_\_\_\_\_ companies and I'm calling in regards to an exciting new project we have with \_\_\_\_\_ and I'd like to tell you about the success we've had with them. Again my name is \_\_\_\_\_ and I'm at \_\_\_\_\_ and I'd like to share about our work with \_\_\_\_\_, again that's \_\_\_\_\_. I look forward to taking your call."

## Networking follow up voicemail here.....

Fill in the following template.

Hi \_\_\_\_\_

this is \_\_\_\_\_ from \_\_\_\_\_

We met at the \_\_\_\_\_

and we chatted about \_\_\_\_\_

And I've got some ideas that can make a significant difference for your company. Do you have some time we can talk?"

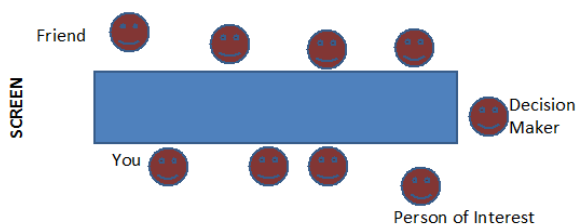
# Map Your Audience

One thing you can do to keep organized is to map the audience during a presentation. When first meeting a group of strangers it's hard to recall their names and responsibilities. At the start of the meeting you will shake hands with everyone and the name's will come fast and furious. How can you keep them all straight?

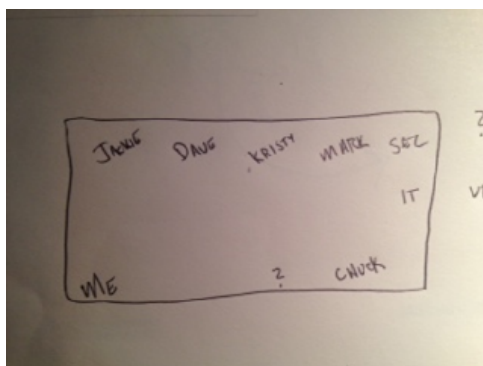
When the meeting starts and have everyone sit down and request a round of introductions.

Take a piece of paper and draw a brief map of the room. As you go through introductions write down their first name and what they do. Have them speak slowly, and you can ask a little about their job to further solidify your memory.

Sit to the side  
Let group align their pecking order



I commonly set at the bottom left position, near the projector giving the presentation. But it varies depending on the room. Even if I'm meeting only a few people I draw a little map.



A little bit of organization eliminates the stress of remembering things and allows you to focus on more important responsibilities. Good luck!

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# Selling With Storytelling

Stories have always existed – to entertain, teach, pass on wisdom, record history, represent beliefs, explore new ideas, share experiences, build community, and express creativity. It only makes sense that they are a **fundamental** aspect of sales.

The story is the basic unit of learning and as such is very important from our earliest years, listening to stories from our parents. The word, story, is derived from the Greek word meaning knowing, knowledge and wisdom. Human beings seem to have a natural tendency to think, speak, be receptive to, and process our experiences in story. The appeal of storytelling is the appeal of the imagination. When selling if we listen to story it gives us the opportunity to create our own images, our own personal blend of imagined sights, sounds, feelings, and much more. We are much more likely to buy.

## STORY model

STORY is an acronym for a storytelling model. The goal is to make the protagonist, you're prospective client, a hero!

**Setting - Once upon a time ...**

**Trouble - A problem or issue the Protagonist is facing.**

**Opportunity - Do they overcome the trouble?**

**Redemption - They take action, pick you, and become the Hero.**

**Yes - The Hero lives happily ever after.**

Take the above framework and author your business story. Use the following script as a guide.

## Build Your STORY

Fill in the blanks. The Protagonist is an existing client.

Once upon a time (the Protagonist)

Everyday (SETTING):

One day there was TROUBLE:

They realized they had a choice (OPPORTUNITY). They could do:

or they could do:

They made the right choice (REDEMPTION) and picked:

They are please with their decision and YES you can meet them:

### Complete the Script

This is a complete framework for authoring your own business story. Tell us about the life of one of your clients. What was the setting? How did trouble arrive one day? And how did that trouble manifest and what were the opportunities? Then share how you came to the rescue. What happened when they became the hero? **Tell us that story.**



