

# Making A Sale: Seven Steps To Success

*Eliminate the chance for buyer's remorse by executing the plan and following up with the customer*

By Jim Peduto

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[Last month](#), Dave Frank helped us understand why the “seat-of-the-pants” approach to selling no longer works and defined the components of an effective sales structure.

This structure is absolutely essential and is an excellent place to start. However, within the structure, you’ll need to develop and define a functional sales process. This process is a seven-step guide to making a sale. Without it, your sales team will lack the customer-specific knowledge to call on, track, fulfill and follow up on sales opportunities.

**1. Greeting and rapport:** Hopefully, with your customer-profiling tools, you’ve already identified a prospective customer that fits with your business. Now, schedule a face-to-face meeting. Be polite and courteous, make the customer feel at ease and try to observe the customer’s behavior and needs. A non-aggressive, non-threatening introduction will make the customer comfortable enough to move into a deeper conversation or a meeting.

**2. Mutual agreement:** When planning to meet with a customer, agree on a time and place to meet. Come to the meeting with a mutually defined agenda and stick to it. Ask for or offer options rather than telling the customer what he

or she should do.

**3. Pain:** Get permission to ask questions that will help you identify the customer’s pain or need. Questions such as “How long?,” “How often?,” “What have you tried?” and “Do you want to change?” will give you important answers. Listen for clues of pain in dollars, which will help you with the next step.

**4. Budget review:** When it’s time to talk budget, establish a cost range based on the customer’s pain. Review the pain issues with the customer using sales tools such as a PowerPoint presentation or a chart. Do not assume that the cost of your service is too high. Ask the customer if the range you provide is feasible. If not, find out what is and adjust your service plan accordingly.

**5. Decision and authority:** Depending on the type and size of the prospective customer, there may be a protocol for making purchasing decisions. Find out who else is involved,

what the process entails and what needs to happen to make the sale. Be prepared to present your proposal to a committee or group of people.

**6. Fulfillment and presentation:** For the formal presentation, begin with a review and an agreement on the issues discussed and make the return on investment clear. Be ready to answer questions. Find out from the customer when would be a good time to follow up.

**7. Post-sale activities:** The selling process does not stop with the sale. If the customer accepts your presentation, thank him or her and eliminate any chance for buyer's remorse by executing the plan, following up and covering any additional details.

The sales process is not just for new or potential customers. Following the process will also help you keep longtime customers. Be honest about any weaknesses you discover along the way and make corrections. The results will only bring your business more prospects, more customers and more profit. 