

## BUSINESS/FINANCES

### SELLING YOUR SERVICES OR PRODUCT

- Follow up all contacts from your prospect as soon as possible after they have contacted you. Do not let more than 24 hours pass without responding to the prospect either by email or telephone.
- Send your prospects and clients letters of acknowledgement or Thank You notes using "snail mail" (US Postal Service). This demonstrates that you are taking time to acknowledge their business.
- Do as much research on a prospect as possible. Study their web site, marketing brochures, products, etc. so you know when the company started, what they sell and where they are located. Invest a couple of hours to learn who your potential client is.
- Arrive on time to any and all meetings.
- Dress appropriately for prospect/client meetings. You are providing an impression of how competent and trustworthy you are and your attire is the first thing they will notice and judge.
- Carry your files and papers in a professional briefcase or attache. This will not only protect the papers, but will also look more organized.
- If possible, provide quotes and estimates in folders or binders that have been personalized for the client. This demonstrates a personal touch as well as organizational skills.
- Take notes on every meeting.  
*Tip: Using a standardized form for all meetings, makes it easy to gather all the needed information without forgetting something important.*
- Summarize action items verbally at the end of the meeting so that both sides agree on the needed actions and who is responsible. Indicate a due date for each and every action item. Make sure your commitments are dates that you can meet.
- After a meeting or telephone call, schedule a time and date for the next contact.
- When presenting a proposal or price quote, attempt to deliver this in person or on the phone. Do not just mail (or email) it and expect to have the prospect contact you, ready to do business.
- When possible, deliver promised documents, quotes, etc. earlier than you had promised.

#### Items to include in a Proposal or Quote

- If appropriate for your business, provide testimonials from previous clients (check with prior customers before providing contact information).
  - If other people in your company will be providing the service or product, be sure to include contact information so that the client knows who to contact for any questions or problems.
  - Include a timetable or chart indicating when certain things will be done or what dependencies exist.
  - Include an FAQ (Frequently Asked Questions) if appropriate.
  - Include any newspaper or magazine articles that have favorably reviewed your product or service.
  - Include the pricing structure including any down payment amounts required.
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- Ask for their business.
  - Once you have won the business, go the extra mile. If you are catering a party, provide an extra dessert or table decoration. If you are selling a new pool, include free chemicals or pool equipment. Decide what is appropriate for your business.
  - If someone else sent you the referral for this new client, be sure to send a Thank You to this person and perhaps a token gift or lunch.
  - Do what you say you will do, and do a little bit more or do it faster. This will help you win more business.