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| **Sales Stage / Process** | **Notes/Guidance** |
| **Connection** | **Purpose:** Build rapport, establish trust, and create a warm, professional first impression.  **Important notes:**   * Always consider first impression - check your background, 'look', be very well prepared and always appear well-prepared, fully engaged (they are your only focus), and excited to be meeting with them * Do your research beforehand – know the person, organization, and any existing relationship with Athlete Assessments (ensure to look up in Salesforce) * Look for how you are already associated with them, it is a small world in sport, or make reference to the introduction / how you are meeting * Be friendly, confident, and authentic—this stage is about human connection, not selling. * Be present—listen intently and take notes on anything personal or professional that may be relevant later (e.g., challenges, interests, goals).   **Questions to ask:**   * Share a positive, appropriate and professional anecdote or comment about current affairs (never negative) * Identify something you have in common or a connection to their organization or sport (i.e. I visited your campus when I was a coach... Or athlete... or my second cousin went there?) * If not already obvious, ask 'how did you hear about us?'... (this helps marketing too) * If appropriate (i.e. they have approached us), ask:   + 'And how can we help?' or “What prompted your interest in our programs/services.” * If we are approaching them, make a link as to why you think we can add value...   + "Joe mentioned you have a program similar to them and they thought you'd be interested in how we've helped them... I'd love to hear about your [program].. |
| **Discovery** | **Purpose:** Understand the client’s needs, pain points, goals, and context to assess fit.  **Important notes:**   * Avoid jumping to solutions—stay curious and ask open-ended questions. * Identify what matters most: performance, team culture, leadership, communication, confidence, retention, etc. * Learn about their timeline, budget, and urgency. * Share relatable examples or case studies, but keep the focus on them.   **Questions to ask:**   * Liz typically says something like "I'm open for our discussion to go in what ever direction is of most interest and value to you... I'd love to hear about your 'program / team etc...' * Ask as many open questions as you can, listen intently, ask more questions, and more question... Don't stop asking questions until fully explored... * Tell me about [organization]... * What's your role? * Tell me about where your current major focus is? * What is key for you this [year / season / semester] * What is something you're hoping to achieve / working on? * What areas do you want to improve? What do you think will make a big difference? * What have you tried in the past that worked well—or didn’t? * What classes do you teach? What do the students struggle with the most? How do you prepare them for post-graduation? How are their 'people skills'? What leadership development do you do? What works well? What would you like to see improved? * What does the ideal outcome look like if you had the right support or solution? * Who else is involved in the decision-making process? * 'Tell me more about that?' is Liz's favourite question! |
| **Solution** | **Purpose:** Present the most relevant Athlete Assessments’ solution(s) and how they meet the client’s goals.  **Important notes:**   * In presenting an outline of a solution / our proposal... Link the key points from discovery to how our program / service will address these... * Use language that reflects their own—mirror priorities and phrases they used. * Share examples from other clients so they feel in great company * Offer clarity on what’s included: assessments, accreditation, support, resources, integration, timelines. * Avoid feature-dumping—focus on impact.   **Questions:**   * Based on what you’ve shared, can I walk you through a program I would suggest / that we can tailor to suit your exact needs? * Would you like to see how other clients with similar goals have approached this? * How does this approach feel to you? Do you see it fitting with your current initiatives? * If you aren’t sure of the right solution, thank them for sharing and being so open, and say you will take some time to review and put together the best options to meet their needs. Commit to a timeframe to provide this (within 2 days ideally), plan for a follow up discussion the following week. Try to schedule it before ending the call. |
| **Close** | **Purpose:** Confirm interest, overcome objections, and secure next steps or commitment.  **Important notes:**   * If the above is done well, the close looks after itself * Be confident and clear—people buy clarity. * Address objections calmly and with empathy (e.g., cost, timing, resources). * Reinforce value—not just the service, but the long-term impact and support. * Always confirm and calendar the next step (e.g., “I’ll send through the proposal today, and we’ll reconnect on Thursday to go through it together?”). * Celebrate the partnership—they’re not just a customer   **Questions:**   * Ask an 'assuming question' i.e. assume the sale... "Would we get started in the Fall semester, or do you have a Summer class that you'd prefer to begin with?" * "When would you like to get started?" * "What timing works best for you to begin?" * "Is there anything else you need to be across before we get started?" (this tests for objections) |