

Making Everything Easier!™

Sales Presentations

FOR
DUMMIES[®]
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Learn to:

- Master a proven blockbuster formula to engage your audience
- Leverage the power of storytelling to connect and soften resistance
- Use customer insights to ensure your solution is top-of-mind in buy decisions

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Introduction

A sales presentation isn't a motivational speech. You want your prospect to do more than feel good after your presentation. You want him to take action. Building and delivering a persuasive presentation requires a different strategy and approach than other types of presentations. You need more helpful advice than "Make good eye contact and don't read from your slides."

A sales presentation isn't a dull data dump either. Today's buyers are more informed than ever. Engaging today's busy decision makers — and keeping them engaged — is mission critical. Attention spans are low and distractions are high. Buying cycles have increased in length and complexity. Competition is fierce. Cookie-cutter presentations and long corporate overviews have gone the way of the fax machine. Yes, you can still use them, but your audience members will roll their eyes.

I wrote *Sales Presentations For Dummies* after training sales teams all over the world and recognizing that most are operating off beliefs and techniques from the 1970s, '80s, or '90s — well before prospects were able to escape to their smartphones or tablets the second they weren't engaged. With this book I hope to help you rise to the challenges of presenting in today's selling environment. Whether your presentation or demonstration is formal or informal, virtual or live, this book gives you the strategies and tactics you need to win more deals, more consistently.

About This Book

Regardless of industry, location, or company size, salespeople face three common challenges when giving a sale presentation today:

- ✓ How do you keep your prospect engaged long enough to hear your message?
- ✓ How can you differentiate your solution in a crowded marketplace?
- ✓ How do you present your product or service in a way that inspires your prospect to take action or is remembered when buying decisions are made?

In *Sales Presentations For Dummies*, you find the tools, techniques, and best practices for addressing those challenges and more. The techniques here are proven to shorten your sales cycle and have a dramatic impact on your win ratio. I organize this book around the sales presentation process, from planning your presentation to using discovery to closing with a strong, clear call to action, from developing a tailored message to delivering that message with confidence and skill. Along the way I explore a variety of contemporary presentation scenarios: virtual presentations, product demos, team presentations, and more. You also see examples drawn from real-world sales presentations and get step-by-step instruction on how to make your presentation more compelling, persuasive, and memorable.

Within this book, you may note that some web addresses break across two lines of text. If you're reading this book in print and want to visit one of these web pages, simply key in the web address exactly as it's noted in the text, pretending as though the line break doesn't exist. If you're reading this as an e-book, you've got it easy — just click the web address to be taken directly to the web page.

Foolish Assumptions

Just like you must do for a sales presentation, I have to make a few assumptions about you, my audience. You don't need to check all the boxes to qualify — all you need is one and this book is for you. Here are the assumptions that I make about you:

- ✓ You didn't arrive here by accident. You're in sales. Your title may be business development manager or sales engineer, but you have a role in persuading a prospect to purchase or lease a product or service.
- ✓ You give presentations or demonstrations. Formal or informal. Virtual or live. Long or short. No matter the kind, you engage in a purposeful sales conversation with the goal of closing or advancing the sale.
- ✓ You have sales experience but recognize you need new tools to engage and persuade today's busy decision makers in a highly competitive market.
- ✓ You're new to sales and you want to start off with best practices for today — not 1980.
- ✓ You have picked up a few good presentation basics. But because your competition has too, you need to up your game.
- ✓ You're not technically in sales, but you need to make a persuasive case that inspires someone — a manager, a committee, a partner — to take an action or change a behavior. Forget the fact that this is the definition of sales, and let me just say, Welcome. You are also in the right place.

Several of the preceding assumptions, a few, or just one may apply to you. No matter what, this book can help

you elevate your sales presentation to start winning more deals right away.

Icons Used in This Book

I use the following icons in the book's margins. Use them as a roadmap for important information.



These are tricks, shortcuts, or best practices that separate you and your presentation from your competition.



These are points you need to become familiar with in order to build and deliver a persuasive case to today's busy prospects.



Watch out! This icon focuses on things that you can do to make your prospect question your credibility or cause you to lose valuable attention.



This icon directs you to free supplemental information at

www.dummies.com/extras/salespresentations.com.

Beyond the Book

You can find some free articles online that expand on some of the concepts in the book, like the power of your opening to influence the sale, seven tips for storytelling success, and how to gamify your sales presentation. You

can find links to the articles on the parts page and on the Extras page at www.dummies.com/extras/salespresentations.

In addition to the material in the print or e-book you're reading right now, this book also comes with some access-anywhere goodies on the web. Check out the free Cheat Sheet at

www.dummies.com/cheatsheet/salespresentations for helpful tools like the performance tool checklist, props checklist, a list of opening hooks to get you started, and how to remember the difference between features, benefits, and value. Print them and keep them handy for when you're working on an opportunity.

Where to Go from Here

Ready to get started? Jump in! The great thing about *For Dummies* books is that you can begin at any point and not feel like you missed a day at school. This book isn't linear — so feel free to focus on a subject that you need some expertise on right away. If you have a new sales presentation opportunity, find out what you need to know to get started in [Chapter 1](#). Tired of competing with your prospect's smartphone for attention? Find effective new ways to keep him engaged in [Chapter 14](#). Need help coming up with a killer opening? Check out [Chapter 5](#). If you have a product demonstration next week, check out [Chapter 18](#). Have a web presentation coming up? Get right to it in [Chapter 17](#). Want to leverage the power of storytelling in your presentation? Find innovative tips in [Chapter 12](#).

This book is chockfull of techniques and ideas. I suggest you try a few at a time and add as you go. Keep this book handy so you can check out new ideas and continue to grow your presentation tool kit.

Part I
**Getting Started with Sales
Presentations**



When creating a sales presentation, you have a lot to keep track of, including what tools to use and when. The

Cheat Sheet at www.dummies.com/cheatsheet/salespresentations has some handy checklists that you can print for each presentation that you give to ensure that you don't forget anything important.

In this part ...

- ✓ Understand what an effective presentation is and what you need to do to make sure your presentation is successful.
- ✓ Know all that goes into planning a persuasive presentation that makes a compelling case for your product or service.
- ✓ Identify the challenges of presenting today and turn them into opportunities.
- ✓ Uncover your prospect's business challenge and the impact it's having on his organization.
- ✓ Discover prospect insights and find out how to apply them for a competitive advantage.
- ✓ Build your presentation on a solid value proposition to differentiate your solution and build credibility.
- ✓ Tailor your message to resonate with different decision makers, stakeholders, and influencers.

Chapter 1

Embracing the Future of Sales Presentations

In This Chapter

- ▶ Comprehending today's requirements for an effective presentation
 - ▶ Putting together a presentation that persuades
 - ▶ Taking the steps to prepare for your presentation
 - ▶ Handling today's presentation challenges
 - ▶ Adapting for special types of sales presentations
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Way back in the 1980s, salespeople didn't have to compete with smartphones and tablets for their prospect's attention. Rarely more than one or two decision makers were involved, and buyers had much less access to information on your product or service. You certainly didn't do virtual presentations or demonstrations. In the second decade of the 21st century, technology continues to change and so do your prospects. Yet when it comes to sales presentations, too many salespeople are still using tools and techniques from the '80s. At least they've dropped the leg warmers.

Today's selling environment requires a whole different approach to your presentation. To give a presentation that persuades today's busy prospects, stands out from your competition, and is remembered when buying decisions are made, you need to start carrying some tools from the present in your presentation kit.

This chapter serves as your jumping-off point into sales presentations of the 21st century. Here you discover the requirements for an effective presentation that resonates with today's decision makers. I introduce a persuasive structure that makes a compelling case for your product or service. You can see why paying attention to your voice, your body, and how you use your surroundings pays off. You also can discover what tools are winning the war for attention. And finally, I explain what adjustments you need to make in special presentations like team selling and web presentations.

Understanding What an Effective Presentation Can Do

An effective presentation in the past typically meant closing the sale. In today's more complex market, a successful presentation can be more like a play in football; it advances the sale. No matter how you spell success, all sales presentations today must meet the following requirements in order to be successful.

Tailoring to meet your prospect's needs

One size doesn't fit all. Today's prospects want to do business with salespeople who have a clear understanding of their needs, their challenges, and their goals. Tailoring your presentation to fit your prospect's unique needs and establishing a customized value proposition is the price of entry in today's competitive market.

It requires discovering how the problem is impacting your prospect's business and how he's currently addressing that problem. Tailoring for today's well-informed prospect often means delivering insights by recognizing areas of improvement or identifying gaps that can shed new light on your prospect's business and tie back to your solution. Tailoring forms the basis of a customer-focused presentation that allows you to show your prospect how you can meet his needs better than your competition. With the commoditization of many products and services, this kind of laser-sharp focus is what will separate you from the competition and turn you into a preferred solution.



Today's presentations must be structured around value, and answer one or both of the following two questions that are in every prospect's mind:

- ✓ **Why buy?** Many prospects are hesitant or afraid to change. Selling against the status quo is a much different strategy than the next question.
- ✓ **Why buy from you?** Making a case for you over your competition in your presentation requires clear and concise differentiation — not always easy when differences are slight.

In [Chapter 2](#), you discover how to gain insights through a discovery process, and in [Chapter 3](#) you find out how to apply those to tailor your presentation.

Gaining attention

Your prospect invites you to give your hard-fought presentation. You have all the decision makers together in one room at the same time. Quick reality check: Do

you have their attention? Don't bet on it. Like you, prospects have other things on their minds. Perhaps they just got off a call with an unhappy customer or they're worrying about how to handle an unresolved issue.



Your first goal is to pull your listeners into the present and break through the mental clutter and physical distractions that plague today's business audiences. Understanding what drives attention and applying that knowledge to your presentation can give you a huge advantage over your competition:

- ✓ **Attention spans fall:** It's not just your imagination. Studies show that people's attention spans are falling faster than the Russian ruble — dropping an incredible 50 percent in the last decade — wait, is that a new LinkedIn request?
- ✓ **Attention bottoms out.** Attention isn't something you get once in a presentation and then you're done. Attention starts off high at the beginning of your presentation and drops to its lowest point in ten minutes, just when you were getting to your good stuff.
- ✓ **Multitasking is a myth.** Finally the truth is out. People can really only focus on one thing at a time. That has loads of implications for your presentation. For example, talking about one thing while an unrelated text-heavy slide is on the screen? Waste of your breath.

Knowing how to make adjustments in your presentation for these changes in behavior is critical. Read how in [Chapter 4](#).

Planning a Killer Presentation

Hordes of data sandwiched between a company overview and an awkward “any questions?” closing neither engages nor persuades today’s prospects. Although Ted Talks — short innovative speeches available at www.ted.com — have shed insight into what engages audiences today, you want your prospect to do more than feel good when you’re done. You need a persuasive structure that leads to action, which I discuss in the following sections.

Hook them with the opening

Fair or not, during those critical first few seconds during your *opening*, your prospect is evaluating you, making decisions about how and whether they are going to listen to you. In fact, research has found that the majority of jurors decides on the verdict — and sticks with it — during the opening arguments. Although you’re not on trial, you need to know what you need to accomplish with your opening:

- ✓ **Capture attention.** Use a relevant opening *hook* — something that makes your prospect put down his smartphone and pay attention, like a story, a quote, or an insight — to get off to a strong start.
- ✓ **Define the situation.** Quickly comparing how your prospect is dealing with the problem to what your prospect’s situation looks like after the problem is resolved gives your prospect a reminder of why you’re there and a vision of where you’re headed.
- ✓ **Establish value.** Busy prospects hate to have their time wasted. Giving them a sense of value initially is critical to gain early buy-in.

- ✓ **Sell the next minute.** Like many movie previews, too many salespeople reveal the whole plot in their opening. Keep interest and attention high by holding something back to keep your prospect tuned.

Seem like a tall order for the top of your presentation? You bet it is. Don't leave your opening to chance. The sale could be riding on it. Find out more about creating a powerful opening in [Chapter 5](#).

Create tension in the body

The *body* of most sales presentations is made up almost entirely of a long list of features that leave your prospect longing for a fire drill. In a persuasive presentation, use the body to build tension by exploring the gap between your prospect's current situation and where they want to be. Here's why:

- ✓ **Establish priority:** Prospects often have competing priorities. You need to make a case for why yours should take precedence.
- ✓ **Avoid pain:** Research proves that people are much more willing to take a risk to avoid pain than to embrace an opportunity.
- ✓ **Fight the status quo:** Getting prospects to move off an "If it ain't *too* broke, don't fix it" mentality requires cranking up the heat well before you get to the closing.

You can read more about ratcheting up the tension in [Chapter 6](#).

Resolve with a solution

Every presentation ends, but very few close. A good *closing* resolves the tension and makes it easy for your prospect to take the next step. Afraid of being repetitive

or sensing real or imagined impatience, salespeople often rush to wrap up things and skip or mumble through vague next steps.



As the final impression you make on your prospect, closings must shine as brightly as your opening, provide value, and give a clear and measurable call to action. [Chapter 7](#) gives you more information about closings.

Devoting the Necessary Preparation

Too many great concepts fail to execute because of a lack of preparation. As a salesperson, you have to wear a lot of different hats — that of researcher, strategist, designer, and performer — which can cause you to feel stretched for time. But by applying some of these simple preparation strategies you can streamline your process and improve the impact and outcome of your presentation.

Creating dynamic presentation material

You probably have sat through your share of deadly PowerPoint presentations with their many bullet points, bouncing shapes, and dizzying animations. If slides are your medium of choice, get updated on contemporary design guidelines to keep your presentation from triggering nausea. Following are some key things to remember when planning your presentation material:

- ✓ **Start with a concept.** Most salespeople jump to create slides the minute they get the presentation on their calendar. Taking the time to stop and consider what you want to accomplish can save you from showing up with a PowerPoint collage of ideas and styles.
- ✓ **Focus on one idea.** The rule of “one slide — one idea” can keep your presentation clean, clear, and on point.
- ✓ **Set the tone.** Is it serious or light? Emotional or logical? The tone or feeling you want to create influences everything from your theme, your colors, your choice of pictures, and your fonts.
- ✓ **Say it with a picture.** A bold graphic can communicate an idea quicker than a slide full of text.

You can discover more helpful design tips in [Chapter 9](#).

Using your performance tools

Like an actor, you’re auditioning for a role in your prospect’s business. To win the part, you need to do more than just memorize the lines. Most salespeople spend the vast majority of their time preparing the message and forget about the messenger. The following are your performance tools, and they’re a ready resource for enhancing and reinforcing your message:

- ✓ **Your voice:** As the delivery vehicle for your message, your voice holds a lot of power, yet few people use it to its full potential. Variety in volume, pacing, pausing, and emphasis can draw attention to key messages and make your content come to life.
- ✓ **Your body:** How you use your body — gestures, movement, eye contact, stance — sends a steady stream of information to your prospect. That

information can say “I’m credible and confident and you should listen to me,” or “I wish I were anywhere but here!”

- ✓ **Your stage:** Your stage is your surroundings. How you move about your stage can renew flagging attention or be a source of distraction.

Refer to [Chapter 11](#) for more about using your voice, body, and staging.

Leveraging the power of stories

Logic is great stuff and presentations are packed with it. But logic doesn’t engage your prospect on an emotional level — and most purchases are decided with emotion and justified with logic. Stories are powerful vehicles for triggering emotions, changing opinions, and creating memories.

You may be hesitant to use a story in your presentation because you’re concerned your prospect will get impatient. Of course, the real danger is if your story is too long, irrelevant, or trivial. In [Chapter 12](#), you discover how to craft a purposeful story that addresses a specific need in your presentation and connects quickly and easily to your prospect’s goals.

Dealing with Potential Problems

Texting during your presentation, prospects entering and exiting the room, technical difficulties, objections — can and will occur — when giving a presentation. How you deal with them determines whether your presentation gets back on track and running smoothly or ends up at the wrong destination.

These sections introduce you to a strategy for regaining your prospect's attention after you lose it and for handling objections when they arise.

Maintaining engagement and focus

Attention isn't constant. Planning to reengage your audience throughout your presentation is a necessity today. Luckily, certain things have the power to draw people's attention. Leveraging this fact by using a variety of these different techniques throughout your presentation can keep your presentation fresh and your audience engaged:

- ✓ **Introduce a prop.** A whiteboard, flipchart, a product sample, even an ordinary object like a phone, or a book, can serve as a visual cue to regain your prospect's attention and reinforce recall.
- ✓ **Interact with your audience.** Questions aren't the only form of interaction; try taking a poll, running a contest with a cool but inexpensive giveaway, or giving someone in your audience a role in your presentation to regain attention.
- ✓ **Use movement.** Getting out of the comfort zone behind your laptop is crucial in order to form a connection with your prospect. Look for opportunities to approach your audience, like when you're telling a story, posing a question, or discussing your prospect's challenges. If you're seated, use gestures to underscore your message and focus your prospect's attention.

Check out [Chapter 14](#) for more fresh ideas on keeping your audience engaged.

Handling objections

Although most salespeople would prefer not to get any objections, *objections* are actually a sign of an engaged prospect. What makes it uncomfortable is not having a good process in place for handling an objection. Here are some quick tips for dealing with objections in a way that moves the sale forward:

- ✓ **Preempt an objection.** The best defense is a good offense! Brainstorm possible objections and come up with a response for each type — price, timing, features — and diffuse the objection by including it in your presentation before your prospect has a chance to bring it up.
- ✓ **Break up the objection.** Objections can trigger your fight-or-flight instinct, negatively affecting how you respond. Before you jump to answer the objection, take a deep breath, break it down by listening, pausing, and then clarifying to make sure you're answering the real objection.
- ✓ **Say “yes and”** This rule of improv is effective and easy for handling the toughest of objections. Simply acknowledge your prospect's objection (say yes), add your perspective (with “and”), and ask an open-ended question to collaborate on a solution with your prospect.

Head to [Chapter 15](#) for more suggestions on how to prepare for objections and handle them during your presentation.

Preparing for Special Presentations

Although persuasive presentations share many common characteristics, certain types of sales presentations — team, virtual, demonstrations, and so forth — offer unique challenges. These sections give you a quick overview.

Presenting as a team

If you're involved in a strategic sale — high stakes, multiple steps — more than likely you're a member of a sales team. Your success rides on your team's ability to present a united front and a cohesive message. With unfamiliar team members often stretched for time, team presentations can start to resemble Frankenstein's monster: a mish mash of styles, an unsteady delivery, and unpredictable results. To make sure that everyone on your team is singing from the same songbook, remember these points:

- ✓ **Assign clear roles.** Having one person as the point person who collects all presentation materials and another who handles all the logistics can keep information from getting lost or balls from being dropped. Having a go-to person to handle certain types of questions can avoid missteps during your presentation.
- ✓ **Use good rehearsal practices.** Forget the dry run; team presentations require a full rehearsal — including those transitions and hand-offs where many teams lose valuable points.
- ✓ **Reading cues:** A *cue* is a predetermined body or eye movement, or sound that sends a signal to your teammate. Planning a few clear, memorized cues to use during your presentation can resolve much of the confusion and have you operating as a true ensemble.

See tips on how to present as a team in [Chapter 16](#).

Delivering a web presentation

Fitting your content and your style to your medium is critical, as is improving your connection with your audience. Web presentations are typically live presentations crammed onto a small screen with understandably disappointing results. Remove the cloak of invisibility and increase the engagement in a web presentation through the following techniques:

- ✓ **Leverage the power of your voice.** Without your physical presence your voice plays even greater importance in getting your message across and engaging your audience.
- ✓ **Incorporate polls and other web tools.** Using your web tools can help break up some of the monotony of endless slides or screens.
- ✓ **Use a webcam.** Increase your visibility in a web presentation by using a webcam. People respond much more positively to faces than a disembodied voice. Because many salespeople still prefer to go unseen, you'll also have the advantage of standing out in your prospect's mind.

You can find out how to make your web presentation more engaging, interactive, and successful in [Chapter 17](#).

Chapter 2

Discovering What You Need to Know Before You Begin

In This Chapter

- ▶ Figuring out the opportunity
 - ▶ Developing a persuasive presentation
 - ▶ Understanding where to find the information you need
 - ▶ Having conversations that produce insights and build rapport
 - ▶ Tracking your progress with a presentation plan checklist
-

You have an opportunity to present your product or service to a qualified prospect, which is no easy feat in today's competitive landscape. After you finish high-fiving yourself, your team, or your dog, what's your first order of business?

- ✓ Pulling out the standard deck and you're ready to go.
- ✓ Diving in to PowerPoint to start cutting and pasting from previous presentations.
- ✓ Creating a presentation plan to gather all the information you need.

Whether you have 10 minutes to prepare or 10 days, the third option is the winning choice. In a competitive

market, planning plays a more critical role than ever in the success of your presentation. Planning means gathering as much relevant information as possible about your prospect prior to your presentation so you can tailor your message to her specific needs in a way that motivates her to take action. Failing to gather the insights you need or ask the right questions with today's savvy buyers can damage your credibility and leave room for your competition to slip by and win the business. Because planning takes time, isn't fun or sexy, it's tempting to skip this step and jump right into picking out graphics and themes or loading up the standard deck — even though neither option may be a good fit for the current opportunity.

Planning a presentation is like building a house. You want to first make sure you have a design and a solid foundation that will produce the results you want. All of the cool videos and flashy graphics in the world can't make up for faulty structure or inconsistent messaging. Without a plan, you may find yourself dodging the following landmines when you're in front of your prospect:

- ✔ Disagreeing on value or goals
- ✔ Focusing on the wrong issue with the wrong person
- ✔ Being surprised by preferences or allegiances
- ✔ Fumbling through unanticipated objections
- ✔ Failing to make a logical and persuasive case

In this chapter, I show you how to create a solid foundation for your presentation. I help you determine what you must know before your presentation to successfully align your solution with your prospect's goals, establish value, and overcome potential

objections. I help you uncover the prospect's challenge and define and quantify the impact on her and her organization. In addition, you discover how to prepare for a presentation that involves multiple decision makers by setting up and conducting discovery conversations and asking questions that produce valuable insights. You also find out how to keep everything on track — your team, your materials, and your technology — by creating a presentation planning checklist.

Evaluating the Presentation Opportunity

As a salesperson, you may have a knee jerk reaction to say yes to any opportunity to present your product or service to a potential customer. With the amount of time and energy that go into pursuing many business opportunities today, you need to make sure that the prospect is qualified and the opportunity is viable before you start to commit limited resources. Being a top sales performer requires being smart about where you spend your time and energy as well as having a clearly defined outcome.

Qualifying the prospect

A *prospect* is someone who has expressed an interest in your product or service and seems like a good fit for your business. Whether you've had an initial conversation or meeting with your prospect or just been handed a lead, before you begin planning, make sure that you have thoroughly qualified your prospect. That means your prospect should meet the following criteria:

- 1. The prospect has a need or desire for the solution that you provide.**

2. **The prospect has the authority to influence or make the purchase.**
3. **The prospect (or the prospect's organization) is financially capable of making the purchase.**
4. **The prospect is likely to take action within a definite time period to resolve their problem.**

Qualifying the opportunity

Even if your prospect is qualified, you want to determine if the *opportunity* is worth all the time and effort you're going to put into it. It's always better to find out before you've spent two weeks preparing that your product or service isn't well-aligned with your prospect's needs. Here are two guideposts for determining if the opportunity is a viable one for you and your company.

- ✓ **You have a favorable chance.** Being the odds-on favorite from the start isn't always realistic, but it's best if the odds are at least even. Not every deal is in your wheelhouse. If your product or service isn't an ideal match, you can't compete on price, or if you don't offer deal-breaking features, you must decide whether to invest the time and energy into pursuing a long shot. Reserving your resources for those opportunities where your chances of winning are more favorable is better in many cases.
- ✓ **The outcome is worth it.** If you're going to invest a significant amount of time and resources in pursuing an opportunity — true in many complex sales — you need to know with some certainty that the payoff is worth the effort. Before you commit, factor in what it takes to win the deal and maintain the business as well as less measurable considerations, such as whether the partnership will be good, whether it can

lead to additional business opportunities, or whether it will simply be more work that keeps you from pursuing more profitable business.



If you're unsure of your prospect's qualifications or the value of the opportunity, stop and get more clarity before moving on. Although there are exceptions, for example, you may have identified a problem or need but the prospect isn't fully convinced it's a problem yet, or the ultimate decision makers aren't involved at this stage, but your audience will have their ear, you may decide to move ahead with the presentation. But a little up-front effort can save you from wasting a lot of time and energy that you could put toward a more qualified prospect or viable opportunity.

Defining your actionable goal

Every presentation needs a clearly defined outcome. When defining that goal, the outcome must be measurable and specific. Otherwise, how will you know if you've achieved it? Actionable and measurable goals give your presentation focus, direction, and a clear call to action.

For example, a goal of "letting a prospect know what we offer" is neither measurable nor specific. In fact, it's not so much a sales presentation as it is public service announcement because no selling is actually taking place. A clearly defined goal would be, "to convince the prospect to recommend our solution to the financial decision makers within two weeks."



The ultimate call to action, of course, is to close the deal, but today's complex buying environment likely has some interim steps along the way to reaching the brass ring. For example, if you're a contractor, it may be to put together a fee proposal. If you're selling software as a solution (SAAS), you may need to secure a presentation to key stakeholders — people who also have an interest in the outcome or can influence the sale. In other cases, the action may be to schedule a deeper dive into a specific topic or secure a commitment to a product or service trial. The goal is to move the sale forward to the next logical action in the buying cycle. Use the following steps to help you determine your actionable goal:

1. Determine what the next step is in the sales process after your presentation.

For example, scheduling a product demonstration.

2. Identify the action your prospect needs to take at the end of your presentation.

For example, setting a date and inviting attendees to the demonstration.

3. Create your call to action around this actionable goal.

For example, "For next steps we recommend setting up a demonstration to key parties within the next three weeks. Bill, if you agree, can you come up with a list of names of people who you think would benefit from attending?" Check out [Chapter 7](#) for tips on how to build a strong call to action.

Determining the Nine Things You Need to Know

The success of your presentation is dependent on the quality of your information. Without relevant, insightful information, you can't make a persuasive case and build value for your prospect. You'll open yourself up to competition, negotiations on price, and longer buying cycles. If you're selling to the C-suite — an executive with the letter C in his title, for example CEO, CFO, or CTO — you won't win their attention or respect. That should make you want to spend more than a little time making sure you have the information you need.

In a world of information overload, more isn't always better. If you gather enough material to write a book on your prospect's problem but haven't uncovered what other options she's considering or the impact of the problem on her organization, you've wasted much of your time. Whether you have a month to prepare or you have to do a presentation on short notice — you're responding to a web lead or referral, or simply a prospect who has an urgent need that can't wait — you need the same type of information to create a new presentation or adapt a current one to fit your prospect's needs. In the following sections I introduce nine key areas of information that you need to tailor your presentation to your prospect and provide an example of how to apply them on short notice.

Identifying the challenge or opportunity

You may have a good idea of what your prospect's business challenge is but it's important not to make any

assumptions at this early stage. Often times what the prospect thinks is her problem is really part of a larger problem. Be as specific as you can when defining the problem or opportunity. For example, “They’re evaluating options to replace their current telecom system because their current system is unable to handle the volume and their contract is up for renewal” is a clearly defined scenario that can guide you as you start to build your presentation. “They’re interested in hearing about our system,” is vague and can lead to a generic overview presentation unlikely to resonate with your prospect.

Uncovering the trigger event

People don’t typically wake up and say “Today I’m going to solve this problem.” Usually some trigger event or catalyst has brought the problem to their attention and motivated them to address it. Knowing what that event is can help you evaluate and gauge the prospect’s real desire to solve the problem. For example, “With the recent outbreak of security breaches in some well-known companies, they’re concerned that their customer-sensitive data isn’t as safe as it could be” indicates a real interest in a timely resolution of the problem and provides specific context to frame your message.

Recognizing the status quo

Unless the problem has just occurred or completely shut down your prospect’s business, it’s likely your prospect has developed some work-around solution. You need to find out how your prospect is currently dealing with the problem. Is your prospect whistling in the dark hoping the problem will go away? Or is she using a bandage when a tourniquet is clearly needed? Discovering how your prospect is coping with the problem can help you