



Commercial Truck Training

YOUR SINGLE SOURCE TO GROW YOUR SALES!

NOW POWERED BY

**ONE
NEXUS**

Checklist for Managers

1. Morning: Ask about the day's plan to include the following:
 - a. __ Which calls are appointment calls (lack of these is a danger sign!
 - b. __ Ask about all prospects they will be calling that day.
 - c. __ Know which calls are 1,2,3,4, or 5th call and how the accounts are developing.
 - d. __ Ask questions about the decision makers (who they are, how are you building relationships, have you identified the economic, technical, user and coach decision makers)
 - e. __ How are you using your coach or do you have one...if not find one!
 - f. __ What are your goals today on progressing the sales process?
2. __ While they are on the road, do the following as the manager:
 - a. __ Review previous days sales reports and make notations on anything you do not understand to ask later.
 - b. __ Determine if the call was a cold call or warm/hot and prepare questions on how they plan to progress the account.
 - c. __ Make a list of upcoming association meetings and be prepared to discuss the sales consultants plan for the association. They should have done the following:
 - i. __ Made contact with the membership director and if possible, gotten the vendor list.
 - ii. __ Meet other vendors in the association to begin forming networks.
 - iii. __ Compiled a hit list of companies they want to do business within the association and plans for gaining two appointments at the next meeting.
 - iv. __ Be aware of any upcoming association events and formulate a plan to leverage the event and participate.
 - d. __ Mid-day: Call all sales consultants while they are on the road and ask the following:
 - i. __ How have your sales calls gone thus far, especially when selling?
 - ii. __ What progress have you made?
 - iii. __ Are you calling on other accounts that use fleet vehicles and surround your designated target to maximize your time?
 - iv. __ Do you need any help?

- e. __ When they return:
 - i. __ Review the day.
 - ii. __ Which calls look most promising and why?
 - iii. __ What is your follow-up plan? (must send a follow up letter and thank you card, this is not an option!) How will you take the account to the next level?
 - iv. __ Ask details regarding the decision makers.
 - v. __ What needs did you uncover? (if they did not uncover any, it was a weak sales call!)
 - vi. __ How did you convert these needs into problems? (refer to training on how this should be done)
 - vii. __ Did you expand the problem to create a sense of urgency? (Refer to training manual on how this is done)
 - viii. __ Did you get the next appointment through offering to analyze the problem or bring additional information?
 - ix. __ What is your follow up strategy?
- f. __ Review tomorrow's plans (if they don't have a plan, make it now!)
 - i. __ Who are you calling on and which ones are appointments. Demand that at least 30-50% of their calls are appointment calls that come from referrals.
 - ii. __ On recent sales, have you followed up with a customer service call to obtain more referrals? (goal is no less than ve and ideally ten)
 - iii. __ If you have gotten referrals, have you followed up and made appointments?
- g. __ Movers (review all accounts that they have contacted more than once and check the progress):
 - i. __ Have you called them back?
 - ii. __ What was the result?
 - iii. __ How long has it been since you made contact and why?
 - iv. __ What is your estimate of when they will be in a position to make a decision?
 - v. __ What is your plan to advance the sales process?

These steps must be followed daily, and all salespeople must be monitored daily