

# In-Person Prospecting

*Nothing replaces being in the same room, face-to-face.*

—Peter Guber

Kelly is a rental uninformed services sales representative. His primary role and responsibility is selling new accounts. He is the top rep in his region and has been awarded a president's club trip each of the last six consecutive years. According to his sales manager, what sets Kelly apart from his peers is relentless prospecting.

Each day Kelly invests an hour prospecting by phone; his goal is to set two to three appointments with qualified prospects. Once Kelly has his appointments set, he researches his database for three to five additional prospects that are nearby each those preset appointments. Then, using the mapping tool embedded in his CRM, he creates an efficient route to each of the prospects in relation to the preset appointment.

Finally, he does a little research on each of these prospects to gain an understanding of what they do and remind himself of previous conversations. He also uses the social channel (usually LinkedIn) to gather information on and download pictures of the key players at the location. This research helps him develop and refine his approach before calling on these prospects in person—before or after his preset appointment.

Since most of his prospects are located in industrial parks or close to other businesses, he also leverages a technique called a T-Call. When he goes to his preset appointments and planned in-person prospecting calls, he makes a T by looking to the right, to the left, and behind him for other opportunities, newly opened businesses, or businesses that are not currently in his database. He walks into those doors as well.

This strategy of mapping his in-person prospecting (IPP) calls around his appointments and leveraging T-Calls maximizes his day. He's able to go to high-value planned appointments while making 10 to 20 face-to-face prospecting touches.

He says he is able to convert about 30 percent of his IPPs into future appointments, gets information on most of them that allows him to update his database, and once or twice a week he meets a decision maker who is ready to sit down immediately and begin a sales conversation.

Kelly told me he also uses IPPs to move past gatekeepers who block him on the phone. "Many times when I go in face to face I can either appeal directly to the gatekeeper to give me a chance or walk in the back door and act like I'm lost. It's harder for them to turn me away when I'm there in person."

## **Limited Application of the In-Person Prospecting Call**

In-person prospecting is part of a balanced prospecting approach for outside sales reps. It works best for residential and B2B reps who work

in a local territory and sell transactional to semicomplex products and services primarily to small and medium-sized businesses where it is easy to walk in without bumping into a wall of security.

I've leveraged IPP calls at large plants and companies, but primarily for information gathering by pumping the security guards or gatekeepers for information about decision makers and my competitors.

Of all the prospecting channels, in-person prospecting is the least efficient. Driving around in a car knocking on doors takes a ton of time. Done incorrectly and randomly (the way far too many outside sales reps do it), you can burn an entire day, make very few calls, and accomplish little more than wasting gas. On the scale of hot to cold, they're mostly cold.

This is why the IPP call should only be used to supplement and complement the other forms of prospecting. With the exception of T-Calls and when driving by a new business in your territory you've never seen before, they should be planned in advance. Yet, there are scores of outside salespeople for whom in-person prospecting is their primary and sometimes only prospecting channel. This is mostly due to:

- A false belief that driving around in their territory aimlessly is somehow working
- Managers who believe that the only good salesperson is a salesperson they can't see
- And, the most common, a fear or inability to use the phone—justified with “I'm just better in person”

When I confront salespeople who justify not using the phone with how they are “so much better in person,” I ask this question:

“It is the middle of winter and snowing or the middle of summer and blazing hot and humid. You get started in the morning doing IPPs. Being honest, how many calls do you think you'll make?”

The truthful answer is somewhere between 10 and 20 before they would give up and go home for the day.

Then I ask: "If I give you a printed list of prospects, how many teleprospecting calls could you make to those same businesses in an hour?"

The truthful answer is usually somewhere between 25 and 50.

This usually gets their attention long enough for me to show them how to leverage IPPs within a balanced prospecting routine to maximize and get the most out of their sales day. To be both efficient and effective.

## **The Five-Step Hub-and-Spoke Technique**

Kasey sells supplies to restaurants. Because competition in her segment is so fierce, maintaining relationships with her accounts is critical to driving repeat purchases. Each day, she is required to visit at least four existing accounts in person.

Like Kelly, from the previous story, once Kasey sets the appointments to visit her existing accounts, she uses the CRM to identify prospects close to those appointments and maps out a route that allows her to call on those prospects in conjunction with her appointment as efficiently as possible.

She typically maps out three to five calls around each appointment, which gives her 15 to 20 in-person prospecting touches a day with new opportunities. She is also able to leverage her existing relationships in the "neighborhood" to convince new prospects to give her a chance.

Casey explained, "Before I started using the hub-and-spoke process I was all over the board. I'd just drive around with no plan. I spent way too much time in my car looking for the 'perfect' prospect to call on rather than systematically working my territory."

The hub-and-spoke process has helped her open more new accounts than any account manager in her company.

**The Five-Step Hub-and-Spoke System for IPPs:**

1. Plan IPPs around preset appointments. Start with appointments you set during your phone block.



2. Leveraging your CRM, develop a list of prospects close by. A zip code search is often the best means to do this.
3. Plot three to five prospects on a map around your preset appointments.
4. Develop the most efficient driving route to call on these planned IPPs with the least amount of windshield time.
5. Give yourself time between appointments—before or after—to call on these prospects face to face. Don't stop until you reach your goal.

Leveraged effectively, IPPs will help you squeeze every drop of opportunity out of your sales day.

## **Preparing for Effective In-Person Prospecting**

Develop your objective for each call in advance and then, if possible, personalize your approach to each prospect. This is accomplished through preplanning. The key objectives of in-person prospecting include:

- *Qualifying:* In many cases, people will give you more information in person than they will over the phone. Plus, you get to look around to see where your product or service will help them and gain insight on your competitor.
- *Making appointments:* If you've got the right person in front of you, but the timing isn't right for a sales conversation, set an appointment to come back.
- *Sales conversations:* You are there, the decision maker is there, and a problem or need exists. Sometimes your timing is perfect and an IPP turns into a full-fledged sales call. Be prepared to close.
- *Building familiarity:* By putting a face with a name with both gatekeepers and decision makers, it becomes easier to get an audience in the future when the buying window opens.
- *Maximizing your sales day:* The biggest benefit of in-person prospecting is you get the most out of your sales day by

reducing windshield time and increasing the number of prospecting calls you can make.

- *Learning your territory:* IPPs help you learn, know, and own your territory.

The primary objective of the IPP is to gather qualifying information. You will use this information to further develop your database and create targeted lists for your phone, e-mail, and social prospecting blocks.

In the best-case scenario, you'll start the conversation right on the spot if the opportunity to potentially close a deal exists.

This past summer I was riding with Carl, a business services sales rep. We'd just walked out of a scheduled appointment and he decided to call on the other four businesses that were in the same industrial park (T-Calls).

The first two calls were quick. We gathered some basic information about the decision makers and the competition.

On the third call, the owner of the business overheard Carl speaking with the receptionist and came out of his office. He shook our hands and explained how he had just fired the rep's competitor and was happy that we had come by. He ushered us back to his office and started tossing out questions. He wanted to see a presentation.

If he'd had a neon sign over his desk that said "Close Me," the buying signals could not have been stronger. Unfortunately, Carl was not prepared to close. In an awkward moment, he had to explain that he didn't have the material needed to make the presentation.

Carl asked to come back later, but the gentleman said he was leaving for a conference and then would be out on vacation. He said, "Just call me in a couple of weeks and we'll get things set up then."

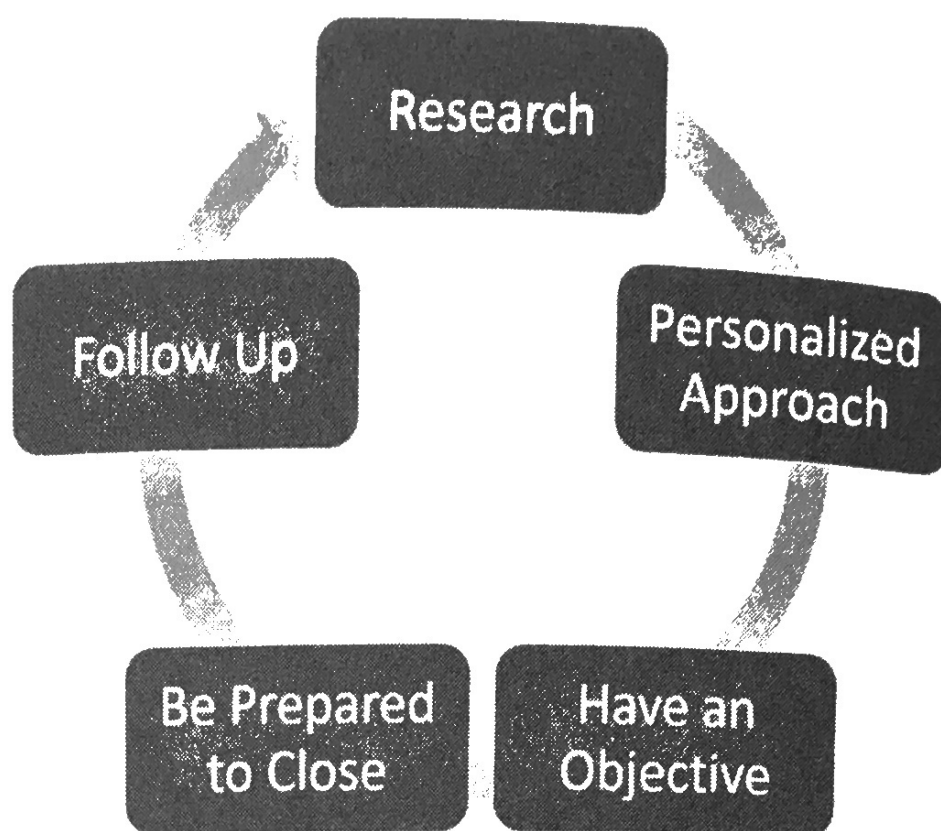
But when Carl called two weeks later, the business owner broke the news that he'd signed a contract with another company that had beaten Carl to the punch.

When you walk through your prospect's door, you've got to be ready. Have an objective for each call, pump yourself up so you walk and talk with confidence and enthusiasm, and carry everything in that you will need to close the sale in the event that your timing is right.

I realize that it is a pain to haul your sales material in on each call—especially when you know that the chance of closing a deal is small. What you can never forget, though, is sometimes you only get one chance with a prospect. Make sure when that happens you are ready.

There are five steps to planning for effective IPPs:

1. *Research.* With planned IPPs, do your research in advance to get decision-maker name(s), learn about the history of their business, visit their website, look for recent press releases, and review your CRM for notes and other insights. For T-Calls, grab your smartphone and do a quick scan of their website and social media sites to pick up any information that may help you ask better questions and refine your approach.
2. *Personalize your approach.* Personalize your approach to make it unique to each prospect. Develop relevant questions about their business, compliment them on recent accomplishments, or offer insights you have that may help them solve a particular problem. It is also a good idea to leverage the relationships you have with nearby customers to gain instant credibility: "We've been doing business with Billy next door for five years and he loves our service."
3. *Develop an objective for every call.* Before you walk into your prospect's door, make sure you have clearly defined what you want to accomplish.
4. *Be prepared to close.* Be ready! Make sure you have everything you need to close the deal with you—sale sheets, order forms, contracts, presentation material, and so on.
5. *Log calls, notes, and set follow-up tasks in your CRM.* It does you absolutely no good to go on IPPs and gather information if you don't log the information in your CRM and set follow-up tasks for additional research and callbacks. Take the time to log each IPP and enter copious notes before the close of each day. If you have time, do it on the spot.



**Figure 18.1 Planning Effective IPPs**

## The Five-Step In-Person Prospecting Call Process

The in-person call process is similar to the five-step telephone prospecting framework. The main difference between the in-person framework and the phone process is the IPP will move along at a slower pace and there will typically be more dialogue.

1. *Approach with confidence.* As we've discussed in previous chapters, there is no substitute for enthusiasm and confidence. These are the two emotions that sell. You must approach IPPs with absolute confidence. Be bold—even if you have to fake it. I've found that there are two keys to confidence:

- *Expect to win.* Walk in like you own the place and ask direct questions that help you gather information and get in front of decision makers.
- *Plan questions in advance.* The research you do in advance helps you plan the questions you want to ask about problems, issues, decision makers, and competitors. Having a plan gives you an extra boost of confidence as you walk in the door.

2. *Identify yourself and say why you are there.* Don't beat around the bush, don't hesitate, and never use cheesy lines designed to trick gatekeepers. You are a professional, so be straightforward

and transparent about your purpose for being there. For example:

- “Hi, my name is Jeb Blount, I’m with XYX Company. The reason I’m here is ABC Company next door is one of my customers and they said I should stop in and introduce myself to your owner, Mary.”
  - “Hi, my name is Jeb Blount, I’m with XYX Company. The reason I stopped by is I provide my service to several of the businesses in this industrial park and I wanted to learn more about your company and situation to see whether or not working with you might be a good fit.”
  - “Hi, my name is Jeb Blount, I’m with XYX Company. The reason I stopped by is to speak to Jerry Richards. I’ve been following your Facebook page and noticed that you are doing regular promotions. We have a tool that can help you improve the impact of those promos and generate more leads. I want to ask Jerry a few questions to see if our solution might be a fit.”
3. *Gather information.* Engage in a conversation rather than an interrogation. Eighty percent of human communication is visual. IPPs are powerful because unlike most other prospecting channels, you use all of your senses to communicate. You’ll be most effective when you relax, are yourself, ask open-ended questions that encourage others to talk, listen, and engage in meaningful conversations.

Avoid the temptation to pitch. You will quickly lose the attention of your prospect if you begin talking about you, your company, your product, or your service. As soon as you start pitching, your ears turn off and so does your prospect.

Sales trainer Kelly Robertson says, “It may sound simple, but most sales people don’t get it. They still believe that selling means talking at great length about their company, their product, or their service. However, truly effective salespeople understand that it is all about asking the prospect the right questions and demonstrating that you can help them solve a particular problem or issue. That means you need to direct *all* of your attention on their situation and



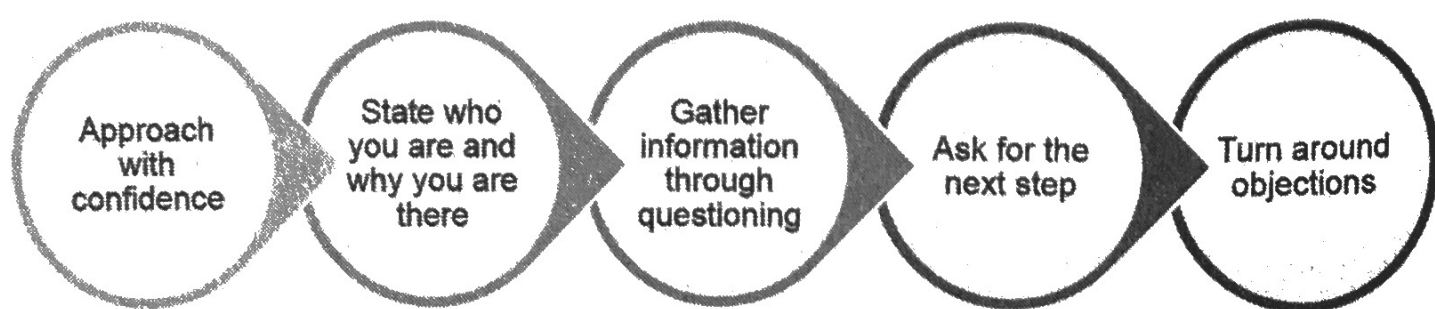
resist the opportunity to talk about your company or your offering.”<sup>1</sup>

Consider what it feels like to be on the other end of a conversation where someone is just talking about themselves. It’s boring. As soon as you start pitching, you look and sound just like every other salesperson who walks through your prospect’s door. Your prospect can tell that you care about nothing other than getting what you want, and that is why they zone out, make you feel uncomfortable, and put up emotional walls.

However, when you get them talking about themselves, show interest, give them your complete attention, and listen, they will engage, give you information, and look for ways to help you.

Before every IPP call, make the conscious decision to focus your attention on your prospect. Tell yourself to listen instead of pitch. Make a commitment to slow down and ask questions, really listen to the answers, and ask relevant follow-up questions.

4. *Ask for what you want.* If you don’t ask, you won’t get. Decide what you want to ask for before you walk in the door, and be prepared to bridge to something else—like closing the deal—if the opportunity presents itself.
5. *Turn around objections.* Because you are interrupting, you’re going to get RBOs. Develop and prepare turnarounds in advance. Review the previous chapter on turning around RBOs for techniques that will help you get past objections and into sales conversations.



**Figure 18.2 5-Step IPP Framework**

## **Put Your Sales Goggles On**

Madison left her appointment with Dr. Roberts, walked straight to her car (with me following), got in, and drove away. “What about all of the other doctors in that complex? Why didn’t we call on those too?” I asked.

Sales reps like Madison walk out of appointments and right past what might be their next sale without blinking an eye. They usually mumble something about not having enough time or lunch or some other lame excuse. But the real truth is they are oblivious. They are myopic and blind to the opportunities that are often right next door to their prospect.

That’s why you’ve got to put on your “sales goggles” so you can see these opportunities. This is how fanatical prospectors do it. They train themselves to be acutely aware of the opportunities around them. They are always on—looking around every corner, behind every bush, and in every window for their next prospect.

Look to the left, the right, and behind you every time you go into or come out of an appointment, and make it a point to walk through those doors and gather information.

Likewise, remain aware as you drive from place to place in your territory. New prospects and opportunities are everywhere. When you see a new business, new construction, or a company you’ve never noticed before, put your sales foot on the sales brake, get out of your sales car, and walk through the door.

Look for the names of businesses on delivery trucks and signs. If the trucks are parked, stop and quiz the drivers. You’ll be amazed at how much information they will give you about the business, decision makers, buying windows, and your competitors.

Personally, I make it a practice to speak to every person I meet who is wearing a uniform or logoed shirt with the name of their company on it. I ask them about their company and who makes decisions there. They can almost always tell me who the decision

makers are at their company and often know where my competitor is failing. I also talk to the person next to me when I'm waiting in line, sitting in waiting rooms, on trains, buses, and airplanes. Over the past five years, I've generated more than a half-million dollars in business from these conversations.

Keep your eye out for business cards pinned to gas station and restaurant bulletin boards. When I see cards that match my sales vertical, I grab them, call them, qualify, and add the information to my database.

If you don't have time to stop and walk into a business or chat up a delivery driver, use that amazing tool in your pocket called a smartphone. When you are driving down the road and you see the name of a potential prospect on a sign or truck, just record a voice memo or note to yourself. Use your camera to take pictures of signs, new business locations, and the sides of trucks. When you get back to the office, do a little bit of research, create a prospecting list, and reach out to qualify or set an appointment.

Remain alert for businesses and people that are using a product or service similar to yours. Recently when working with a group of mobile device sales reps, I asked the question:

"How many of you notice people using mobile phones in public?"

All the hands went up.

"How many of you notice people using outdated phones or phones with cracked and damaged screens?"

All the hands went up.

"How many of you think that most of these people would like an upgrade to the newest equipment or a phone screen that doesn't look like a kaleidoscope and cut their fingertips?"

Most hands went up.

"How many of you hand those people your business card and let them know that you can get them a new phone for little or no cost?"

Not a single hand went up.

Final point: Awareness without action is useless. Be fanatical. Put on the sales brake, walk up to people, ask questions, and hand them your business card. Sure, some people might get irritated, but most people will help you, talk to you, and give you a chance.