



**GATEtoGOALS**® ...guiding action to excellence in dynamic disciplines

## **After the Sale**

*“Now that the big deal is in the bag, let’s have the rep write-up what it took to close that account. We’ll have the success story presented at the next sales meeting for new reps and a reminder of what we all are capable for the experienced reps.”*

*“Please, write down the key factors in the winning of this new customer, and please use this form as we are going to have you present your success at the next sales meeting with other significant wins”.*

“Hmm, well, let’s see, I remember the conversation that took place during the demo with the VP who advocated a different point of view that I suspected came from our competition, and how our pre-sales ace revealed the unique difference between our product thinking and theirs. When done, the VP became more open to our solution and lifted the spirits of his evaluation team in our direction.”

*“No, that is not what we want, we want a running story of how you qualified the account, identified your sponsor, fended off the competition, generated an acceptable proposal, and closed the deal. Keep the story to two PowerPoint slides as we have several to go through in that segment of the meeting.”*

“Hey, I started that campaign 18 months ago, most of that stuff is so old, I would be embellishing my memory to get something to write down.”

*“Fine, keep it to two slides.”*

Remembering what happened in a sales campaign is a challenge for even the sharpest minds, especially for complex and long term capital products and services sales. Developing a better memory for passing on sales success is not the answer, better documentation is. How to document a campaign? The effort would need to be progressive, not at the request of a sales meeting organizer nor as a task well after the fact.

A documented strategy that becomes a successful campaign could be the approach and could evolve into a best-practice example for a certain product/market/region, and could be shared as a sales success as soon as it is closed. Because the selling process is dynamic, normal planning tools will not work.

With more thinking invested in the campaign, good ideas will emerge that shorten the sales cycles, expand revenue, and win sales. The net value will be to make forecasts more

accurate because real-world experience has been transferred as to what it takes to close business.

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**GATEtoSALES**, *The Personal Sales Campaign Management System*

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focused on sales of large and complex capital products and services