

# The Chart

GRADE YOUR CURRENT RELATIONSHIPS. THEN, UPGRADE THEM.

	Level <b>1</b>	Level <b>2</b>	Level <b>3</b>	Level <b>4</b>
<b>OBJECTIVE</b> ▶	To open doors; to “see what’s going on”	To persuade and make a sale, or to advance the prospect through the process	Customer creation and retention; to “find the fit;” upgrade the client and gain information	To continue upgrading and increase share of business
<b>LEVEL OF TRUST</b> ▶	Neutral or distrustful	Some credibility	Credible to highly credible, based on sales person’s history	Complete trust based on established relationships and past performance
<b>APPROACH &amp; INVOLVEMENT</b> ▶	Minimal or non-existent	Well-planned; work to get prospect to buy into the process	True source of industry information and “business intelligence”	Less formal and more comfortable because of trust and history
<b>CONCERN OR SELF-ESTEEM ISSUE</b> ▶	Being liked	Being of service, solving a problem	Being a resource	Being an “outside insider”
<b>PRE-MEETING PREPARATION</b> ▶	Memorize a canned pitch or “wing it”	Set objectives, pre-script questions, articulate Purpose, Process, Payoff	Research trade magazines, internet, analyze client’s competition	Thorough preparation sometimes with proprietary info not available to other reps
<b>POINT OF CONTACT</b> ▶	Buyer or purchasing agent	End users as well as buyers or purchasing agent	Buyer’s end user and an “internal coach” or advocate within the client’s company	“Networked” through the company; may be doing business in multiple divisions
<b>PRESENTATION</b> ▶	Product literature, spec sheets, or rate sheets	Product solution for problem uncovered during needs analysis	System solutions	Return on investment, proof and profit improvement strategies

