Closing the Sale™

For Certification use only. Do not duplicate.

Name

Date
ABOUT FRANKLIN COVEY

FranklinCovey is a global company specializing in performance improvement.

We help organizations achieve results that require a change in human behavior. Our expertise is in seven areas: Leadership, Execution, Productivity, Trust, Sales Performance, Customer Loyalty, Education.

Product and program catalogs can be requested by calling 1-800-331-7716 in the United States or by contacting your local representative outside the United States.

IMPORTANT NOTICE

© Franklin Covey Co. All rights reserved.

FranklinCovey owns or controls all proprietary rights and copyrights to the content contained herein. No part of this publication may be resold (in part or whole), file-shared, copied, reproduced, modified, stored in a retrieval system, transmitted, or made public in any form without the express written permission of FranklinCovey. FranklinCovey may pursue criminal and civil claims for any unauthorized use, misappropriation, or the distribution of any content contained herein. This publication is provided to you for use with the licensed FranklinCovey program or for your individual use only. You are prohibited from using this publication with other training offerings or profiting from it in any way.

Printed in the United States of America. Registered and/or pending trademarks of FranklinCovey in the United States and foreign countries are used throughout this work. Use of the trademark symbols © or ™ is limited to one or two prominent trademark usages for each mark.

Trademarks understood to be owned by others are used in a non-trademark manner for explanatory purposes only, or ownership by others is used herein under license or indicated to the extent known. All persons, companies, and organizations listed in examples and case studies herein are purely fictitious for teaching purposes, unless the example expressly states otherwise. Any resemblance to existing organizations or persons is purely coincidental.

HELPING CLIENTS SUCCEED®, FRANKLIN COVEY CO.
2200 W. Parkway Blvd.
Salt Lake City, UT 84119
1.800.707.5191
www.franklincovey.com/salesperformance
Sales Cycle

**HELPING CLIENTS SUCCEED.**

**PLAN** your sales activities.

**FILL** your pipeline with qualified opportunities.

**QUALIFY** opportunities through or out of the pipeline.

**CLOSE** more consistently.

*Helping Clients Succeed* is the essence of sales. The more passionately and skillfully we focus on creating success for our clients, the more successful we will be.
Our Promise

Our Promise: If you consistently apply today’s mindset and skillset, you will increase your Win Rate by achieving win-win outcomes.

\[
\text{WIN RATE} = \frac{\text{NUMBER OF WINS}}{\text{NUMBER OF FINAL BUSINESS-DECISION MEETINGS}}
\]

You can count on more predictable success because the skills you will learn in today's work session are based on sound, time-tested principles of top sales performers.

Today’s End in Mind: Decide if you will consistently apply today’s mindset and skillset to increase your Win Rate.

Refer to Playbook Week 1: Measure Your Improvement.
Our Process

Today’s work session isn’t a one-time event. It’s a 12-Week Playbook system designed to help you practice principles and skills of top sales performers.

A key to your success will be to choose an Accountability Coach. This person could be a sales leader, a peer, or someone you work with regularly. Meet with your coach weekly, and hold each other accountable to the Playbook assignments.
The Closing Zone

Closing is a process of decision making, not an event. The Closing Zone includes all incremental decisions that narrow choices and enable the client to make the final business decision.

Notes

Refer to Playbook Week 3: Check Your Intent.
“CLOSING ZONE” BEST PRACTICES

- Carefully organize each client call to influence and benefit the client’s decision making process.
- Move from creating as many options as possible to narrowing decisions that lead to the final business decision.

Top-Performer Behaviors

- They sell with the intent to achieve win-win outcomes, where both the salesperson and the client benefit from the outcome.
- They skillfully prepare and create the conditions for good decision making in every client meeting.
- They spend less time talking at the client, and more time discussing with the client those decisions that will best serve the client’s needs.
- They follow a simple, reliable process for good decision making.
The Mindset

Top-performer mindset: My role is to influence decisions to achieve win-win outcomes.

Think of a time when someone helped you make an important personal or professional decision.

What did he or she do to help you make your decision?

What was that person’s intent?
## Today’s Focus

Choose a client opportunity that is within the Closing Zone to work on today. Make sure your opportunity is significant enough to require dedicated focus and preparation throughout the day.

<table>
<thead>
<tr>
<th>Opportunity</th>
<th>Response(s)</th>
<th>Response(s)</th>
<th>Response(s)</th>
<th>Questions (yours/theirs)</th>
<th>Client Objections</th>
<th>Client Key Belief 1</th>
<th>Client Key Belief 2</th>
<th>Client Key Belief 3</th>
<th>Proof Points</th>
<th>Proof Points</th>
<th>Proof Points</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

For Certification use only. Do not duplicate.
How Ready Are You?

The Closing Zone Readiness Assessment

Rate each statement on a scale of 1 to 5. Then total your scores at the bottom. Remain objective, and seek input from the entire team, if appropriate.

1. I know the specific needs of each decision maker who will be attending this meeting.
2. The time allotted for this meeting will allow for a good business decision to be made.
3. I have gained agreement on the agenda with the client prior to the meeting.
4. I have gained agreement with the client on the decision to be made in this meeting.
5. I can summarize the client’s current situation clearly and concisely.
6. I can demonstrate specifically how my solution aligns with the client’s needs.
7. I understand the client’s business objectives when it comes to this opportunity.
8. I have identified questions the client might ask about my solution.
9. I have practiced responses to potential objections the client may raise.
10. I am ready to propose specific next steps for either a “yes” or a “no” decision.

Total

The Closing Zone Readiness Assessment will help you assess how ready you are to successfully close your opportunity and achieve win-win outcomes.

Notes
1. Identify the End in Mind Decision

What decision does the client need to make at the end of the meeting?

My role is to influence decisions to achieve win-win outcomes.

RESULT

Increased Win Rate.

MINDSET

Closing the Sale

SKILLSET

1. Identify the End in Mind Decision.
2. Address Client Key Beliefs™.
3. Resolve objections.
4. Prepare the conditions for good decision making.
End in Mind Decision

The purpose of a Closing Zone client meeting is to enable a decision. The End in Mind Decision is the decision the client needs to make at the end of the meeting.

END IN MIND DECISION CRITERIA

• Make the decision client-centric.
• Make the decision a single decision.
• Allow “no” to be an acceptable answer.
Sample End in Mind Decisions

- Do we agree on the division of labor going forward?
- Does our solution fully meet your needs?
- Is leasing a viable option for your situation?
- Is the service we provide better than the service you are currently receiving?
- Will the terms and conditions work for all the stakeholders?
- Do you have all the information you need from us to make your final decision?
End in Mind Decision—Activity

Identify several End in Mind Decisions that are typical for your Closing Zone client meetings.

__________________________________________________________________________

__________________________________________________________________________

__________________________________________________________________________

Describe in a few words the End in Mind Decision your client needs to make in the next meeting.

__________________________________________________________________________

__________________________________________________________________________

__________________________________________________________________________
2. Address Client Key Beliefs™

What would the client have to believe in order to make the End in Mind Decision with confidence?

My role is to influence decisions to achieve win-win outcomes.

1. Identify the End in Mind Decision.
2. Address Client Key Beliefs™.
3. Resolve objections.
4. Prepare the conditions for good decision making.
Client Key Beliefs

People make decisions based on emotions and beliefs, not facts. We then find facts to support the beliefs we hold. In order to enable good business decisions for our clients, we need to understand the Client Key Beliefs that will drive their decisions.

During the Closing Zone, those Client Key Beliefs begin to narrow and become predictable.

Some of the common Client Key Beliefs you may have to address are:

- You understand our business situation.
- Your solution meets our unique needs.
- The financials make sense for our ROI model.
- Your terms and conditions are acceptable.
- It makes sense to include key executives.
- A pilot is a logical next step for us.
Proof Points

Proof Points demonstrate how your team and solution can satisfy the Client Key Beliefs and help the client make the End in Mind Decision.

Key Beliefs + Proof Points = End in Mind Decision

**PROOF POINTS CRITERIA**

- Connect intellectually with the client.
- Connect emotionally with the client.
- Completely satisfy the Client Key Beliefs.
- Help the client make the End in Mind Decision with confidence.

Notes

Refer to Playbook Week 5: Address Client Key Beliefs.
Client Key Beliefs—Activity

**END IN MIND DECISION**
*Will the terms and conditions work for all the stakeholders?*

**CLIENT KEY BELIEFS**
What would the client have to believe to make this decision with confidence?

**PROOF POINTS**
What would the client have to hear, see, or know to have this belief validated?

_________________________________________________________________________
_________________________________________________________________________
_________________________________________________________________________
_________________________________________________________________________
_________________________________________________________________________
_________________________________________________________________________
_________________________________________________________________________
_________________________________________________________________________
END IN MIND DECISION
Does our solution fully meet your needs?

CLIENT KEY BELIEFS
What would the client have to believe to make this decision with confidence?

PROOF POINTS
What would the client have to hear, see, or know to have this belief validated?

© Franklin Covey Co.
3. Resolve Objections

How will you anticipate and resolve client questions and objections to influence good decision making?

My role is to influence decisions to achieve win-win outcomes.

**RESULT**
- Increased Win Rate.

**SKILLSET**
1. Identify the End in Mind Decision.
2. Address Client Key Beliefs™.
3. Resolve objections.
4. Prepare the conditions for good decision making.
Client Objections—Non-Price

What are your best practices for resolving client objections?

 CLIENT OBJECTIONS
BEST PRACTICES

• View objections as an opportunity.
• Resist the urge to fix the objection.
• Avoid taking full responsibility.
• Explore the client’s resolution first.
The 3-Part Response

1. Acknowledge
   - Slow down.
   - Recognize the client’s concern without agreeing or disagreeing.

2. Understand
   - Get curious.
   - Ask questions to clarify the true nature of the client’s concern.

3. Resolve
   - Determine the client’s criteria for resolution.
   - Work with the client to find a mutually beneficial resolution.

Refer to Playbook Week 6: Acknowledge and Understand Objections.
1. Acknowledge

- Slow down.
- Recognize the client’s concern without agreeing or disagreeing.

“ACKNOWLEDGE” EXAMPLES

“Well, let’s talk about that.”
“I definitely hear your concern.”
“I appreciate your honesty.”
“Tough question. Good question, just tough to answer.”
“Let’s talk it through.”
2. Understand

- Get curious.

- Ask questions to clarify the true nature of the client’s concern.

“UNDERSTAND” EXAMPLES

“Can you give me an idea about how, specifically, our solution is too complex?”

“When you say you’re concerned about ‘too much dependency’—how so?”

“When you say ‘obsolete,’ what does that mean to you in this situation?”
3. Resolve

- Determine the client’s criteria for resolution.
- Work with the client to find a mutually beneficial resolution.

“RESOLVE” EXAMPLES

“How would you begin to resolve this issue?”

“What I hear you suggesting is…”

“Does that seem like a reasonable approach to you?”
Once you understand the client’s criteria for resolving the objection, either…

You can meet it.  
If you can, provide:
• Data.
• Research.
• Third-party stories.

You can’t meet it.  
If you can’t:
• **Reframe** the criterion.
• **Change** the importance of the criterion.
• **Show** that no one can meet the criterion by offering an “apples-to-apples” comparison.
When You Can’t Meet the Criteria—Example

**SITUATION:** The client states that each person on the project must have at least eight years of experience on the platform.

**REFRAME**
Identify the client’s equation: \( X = Y \). Demonstrate your equation: \( Z = Y \).

“You want us each to have a minimum of eight years of experience on this platform. With eight years of experience, you feel that each of us would be highly competent to meet your needs. If we could guarantee competency but could not guarantee the eight years, would that still work for you?”

**CHANGE**
Alter the priority of the criterion to determine the value the client places on the criterion.

“Let’s say our results are real and obtainable, that you and your customers are both big winners, and that stockholders are happy. The only issue we can’t fully resolve to your satisfaction is that every member of our team have a minimum of eight years experience with the platform. Would that one unresolved issue mean you would say no to the entire solution?”

**SHOW**
Offer to do an “apples-to-apples” comparison to demonstrate that no one can meet the criterion.

“On a project of this size, is anyone guaranteeing that all team members assigned to your project will have at least eight years of experience?”
When You Can’t Meet the Criteria—Activity

Read the situation below, then describe how you would reframe, change, or show to help resolve the client objection.

**SITUATION:** The client is asking for the new, upgraded software in an unachievable timeline.

**REFRAME**
Identify the client’s equation: $X = Y$. Demonstrate your equation: $Z = Y$.

**CHANGE**
Alter the priority of the criterion to determine the value the client places on the criterion.

**SHOW**
Offer to do an “apples-to-apples” comparison to demonstrate that no one can meet the criterion.

Refer to Playbook Week 8: Identify Objections You Can’t Resolve.
Client Objections—Price

What are your best practices for resolving price objections?

- Do not get defensive. It actually makes sense for the client to push back on price.
- If giving a concession, get a fair-value exchange in return that is both realistic and beneficial to you and your client.
- Never give the same scope, timing, or division of labor at a lower price.
- Work together, not against each other.
Pricing Levers

Price is affected by many factors, including scope, timing, and division of labor. A fair-value exchange involves adjusting factors (such as scope, timing, and division of labor) so that both you and your client get something of value.

SCOPE + TIMING + DIVISION OF LABOR = PRICE

Notes

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
Fair-Value Exchange

EXAMPLE 1

“You are seeking a $50,000 reduction in our price. One way we could meet that request is to consider advertising and marketing value from your organization in exchange for the discount.”

EXAMPLE 2

“We had discussed a two-year contract for this current pricing structure. If you would be willing to lock in to a three-year contract, we may be able to meet your pricing request.”

EXAMPLE 3

“We had spoken of an 8-week window for delivery. If we were able to spread that out over 16 weeks, I think we could meet your pricing objectives.”

EXAMPLE 4

The current pricing structure was designed with us supplying four full-time resources during the implementation phase. If we can reduce that to three, we may be able to meet you closer to where you want to be.

EXAMPLE 5

The pricing, as is, was developed based on the installation of 30 printers within the first week. If you are willing to accept five installations per week over six weeks, we could offer you the discount you are looking for. Is that something we should discuss in detail?

Identify several fair-value exchanges you could offer your current client.
4. Prepare the Conditions for Good Decision Making

How will you influence the conditions for good decision making before each client meeting?

My role is to influence decisions to achieve win-win outcomes.

Increased Win Rate.

1. Identify the End in Mind Decision.
2. Address Client Key Beliefs™.
3. Resolve objections.
4. Prepare the conditions for good decision making.
Prepare the Conditions

To influence decisions and achieve win-win outcomes, make sure you present:

- In person.
- To the right people.
- For the right amount of time.

**PREPARE THE CONDITIONS BEST PRACTICES**

- Proactively influence the logistics well in advance of the meeting.
- Be willing to push back on logistics that don’t enable a good decision.
- Focus on achieving win-win outcomes.
Preconditioning the Meeting

Preconditioning is confirming the meeting logistics with the client in advance of the client meeting.

Make sure your meeting confirmation includes the following logistics:

- Date and Time
- Place (phone, in office, virtual)
- Attendees (your team/their team)
- Agenda
- End in Mind Decision
Preconditioning the Meeting—Sample 1

Mr. Nguyen,

Thank you for committing to the two hours we need on Wednesday. The one hour discussed previously would not have allowed us to present the full solution we are offering, and we truly want you to be fully informed, whether you choose to work with our firm or not.

As we meet, we are confident of two things: We will present a lot of insightful information and you will have a lot of insightful questions. Our hope is that by the end of our time together, you will be able to confidently answer one question: Does SB&P have a service offering that truly meets your needs?

To that end, we are offering the following as a rough agenda to work from. We will start with openings and introductions and then turn our time to addressing three key questions: Does SB&P have the right service offerings? Does SB&P have the price to win? And finally, does SB&P have the right experience?

If you have any additional questions or comments, please feel free to offer them and we can make adjustments to our plans accordingly.

Circle the words or phrases that most effectively precondition the client meeting. Record below any words or phrases you would change.

________________________________________

________________________________________

________________________________________
Preconditioning the Meeting—Sample 2

Mr. Otte,

Thank you for the time you have set aside next Friday. I have arranged for Steven Jennings, my vice president, to attend our meeting as well. I look forward to the two of you meeting.

To maximize our time, I offer one goal for our meeting—that you are able to make one of two simple decisions:

(1) Our total solution is worth pursuing, or (2) you have better options currently available to you.

Our agenda includes introductions and a brief background on your situation. I will then present our solution to you in three components: printing, software, and services.

By the end of the presentation, you should be able to make a great business decision for your law firm, whether you choose to work with us or not. We are hopeful that we have the right solution at the right price for you.

Please let me know if you have any other changes or recommendations.

Look forward to seeing you next week.

Circle the words or phrases that most effectively precondition the client meeting. Record below any words or phrases you would change.
Hi Cynthia,
Thank you for allowing us the two hours we feel necessary to properly cover our proposal on Friday at 10 a.m. To maximize our time together, I wanted to make sure we are in complete alignment to the proposed End in Mind for our time and the agreed-upon agenda.

The End in Mind for Friday is for us to present our solution to you and the Board of Directors so that, by the end of our presentation, you are in a position to be able to confidently say one of two things: yes, we fully meet the criteria you have chosen for your solution; or no, our proposal does not fully meet your needs. We are very aware of the choice you have to make and realize you will not be awarding a decision on Friday.

We are proposing the following agenda to best enable you to make your decision.

• Welcoming, opening, and introductions.
• Discuss our technical capabilities compared to your requirements.
• Discuss the resources we are allocating to this project.
• Discuss our pricing.
• Final questions based on our presentation.
• Decision as to whether our solution meets your requirements or not.
• Propose mutual next steps.

If you have any additions or comments, please let me know as soon as you can so we can plan accordingly. We look forward to our time together Friday.

Circle the words or phrases that most effectively precondition the client meeting. Record below any words or phrases you would change.

__________________________________________________________________________
__________________________________________________________________________
__________________________________________________________________________
Open and Close

To ensure the client makes the End in Mind Decision during the meeting, prepare and deliver a powerful open and close.

**TO OPEN**

- State the End In Mind Decision for this meeting.
- Summarize the Client Key Beliefs you will address.
- Invite dialogue and participation.

**TO CLOSE**

- Summarize the discussion.
- Call for the End in Mind Decision.
- Propose steps for a “yes” or “no” decision.
# Conclusion—My Actions

Identify two to three actions you will take based on what you learned today.

<table>
<thead>
<tr>
<th>ACTION ITEM</th>
<th>DATE</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Contact information for your Accountability Coach:

<p>| |</p>
<table>
<thead>
<tr>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
</tbody>
</table>

Date of your first meeting:

<p>| |</p>
<table>
<thead>
<tr>
<th></th>
</tr>
</thead>
</table>
**Closing the Sale**

**RESULT**

*Increased Win Rate.*

**SKILLSET**

1. Identify the End in Mind Decision.
2. Address Client Key Beliefs™.
3. Resolve objections.
4. Prepare the conditions for good decision making.

**MINDSET**

My role is to influence decisions to achieve win-win outcomes.
A Solution for Each Stage of the Sales Cycle

FranklinCovey’s *Helping Clients Succeed* suite spans the entire sales cycle, from prospecting new clients to closing the deal. You may choose to roll out the entire suite at once or pick and choose the pieces that apply most to your current situation.
5 ONLINE recognizes that every stage of the sales cycle requires careful planning. FranklinCovey’s online learning portal, 5 Online, was developed to provide expert-designed planning tools and tips for sales leaders and their teams.

FILLING YOUR PIPELINE was designed specifically for sales leaders and their teams who are looking for new and effective alternatives to prospecting. Participants learn how to prioritize their time, and plan how to maximize their prospecting efforts.

QUALIFYING OPPORTUNITIES is designed to help sales professionals learn how to uncover and understand their clients’ needs faster and more effectively in order to identify a solution that exactly meets their clients’ needs. The result is shorter sales cycles, increased client satisfaction, and more wins!

CLOSING THE SALE helps sales professionals increase their win rates by enabling clients to make good decisions that benefit both the client and the provider.

For more information about FranklinCovey’s Helping Clients Succeed suite of solutions, contact your client partner or call 1-800-707-5191. You can also visit www.franklincovey.com/salesperformance.
Notes
**Example 1: Rock Island Federal Credit Union Closing Call Plan**

**End in Mind Decision**
Describe the decision the client needs to make at the end of the meeting. By the end of our two-hour presentation and discussion, Rock Island will be able to firmly answer the question as to whether our proposed solution fully meets their needs or not.

<table>
<thead>
<tr>
<th>Client Key Belief 1</th>
<th>Proof Points</th>
<th>Questions (yours/their)</th>
<th>Response(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Describe what the client needs to believe to make the End in Mind Decision with confidence.</td>
<td>You have complete technical ability to handle the full scope of our project.</td>
<td>Does your solution integrate with the antiquated parts of our system that we are choosing not to replace at this time?</td>
<td>Demonstrate alignment of our Series XI to the stated requirements.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Client Key Belief 2</th>
<th>Proof Points</th>
<th>Questions (yours/their)</th>
<th>Response(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Describe what the client needs to believe to make the End in Mind Decision with confidence.</td>
<td>Our proposed solution goes well beyond the specifications outlined in the RFP.</td>
<td>Our solution will allow for the complete integration of our systems today and tomorrow.</td>
<td>Prove our ability to competently handle the implementation, training, and maintenance of our systems integration and how that expertise allows to integrating their A315-C systems.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Client Key Belief 3</th>
<th>Proof Points</th>
<th>Questions (yours/their)</th>
<th>Response(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Describe what the client needs to believe to make the End in Mind Decision with confidence.</td>
<td>You are choosing to conduct this upgrade over the next couple of years, and demonstrate how we have done this well in other client environments.</td>
<td>They may ask for a larger discount than we are willing to give, based on their size and the fact that if we do business with them, we can go after a lot of smaller companies like theirs.</td>
<td>Prove our ability to competently handle the implementation, training, and maintenance of multisystems integration and how that expertise relates to integrating their A315-C systems.</td>
</tr>
</tbody>
</table>

**Client Objections**
Client: Your solution is significantly more complex than our requirements.

<table>
<thead>
<tr>
<th>Response(s)</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Acknowledge their concern and understand which aspects they believe are too complex before demonstrating the revolutionary approach that allows the simplification of our systems.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Client Objections**
Our proposed solution goes well beyond the specifications outlined in the RFP.

<table>
<thead>
<tr>
<th>Response(s)</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Prove the value of our solution by clearly defining the ROI so they see this as an investment, not as an expense.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Client Objections**
None we can think of for this Client Key Belief.

<table>
<thead>
<tr>
<th>Response(s)</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>We have priced this to get you the results you want. I'm not sure we can move the price without making some important trade-offs. So let's explore some options together. With a three-year contract, we are willing to offer our Platinum-level pricing.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

---

*Certification use only. Do not duplicate.*
For Certification use only. Do not duplicate.

Open

(State the End in Mind Decision. • Summarize the Client Key Beliefs.)

Prepare the Conditions

Date: February 13
Time: 3 to 4
Place (phone, in office, virtually):
Their offices – 18432 Coleman Blvd

Attendees (your team and their team):
Board of Directors
Head of IT – James Thalus
Head of Security – Samantha Wilson
Agenda items:
Open. Cover Beliefs 1, 2, 3.

Close

What will you do if the decision is made before the end of the meeting?

No "Next Steps"

We will position our desire to have one week to align our resources so we can either amend our proposal with the new information needed to fully meet their needs, or withdraw our proposal due to our inability to meet the needs that have been brought up during the final presentation.

"Yes" Next Steps

We have resources aligned to meet or exceed all proposed deadlines and proposed SLAs. Rock Island should be prepared to offer four full-time staff members and give complete access to all security systems.

Close with summary and decision.

EXAMPLE

Closing the Sale—Best Practices

Mindset: My role is to influence decisions to achieve win-win outcomes.

End in Mind Decision

What decision does the client need to make at the end of the meeting?

Client Key Beliefs

What would the client have to believe in order to make the End in Mind Decision with confidence?

Proof Points

How can your team and solution satisfy the Client Key Beliefs and help the client make the End in Mind Decision?

Client Objections

How will you anticipate and resolve client questions and objections to influence good decision making?

Open

How do you set the context for a decision-making meeting?

Close

How do you ensure that a decision will be made before the end of the meeting?

Prepare

How will you influence the conditions for good decision making before each client meeting?

Proof Points must:

• Connect intellectually with the client.
• Connect emotionally with the client.
• Completely satisfy Client Key Beliefs.
• Help the client make the End in Mind Decision with confidence.

Client Key Belief 1

Rock Island has grown tremendously over the past 20 years to become a mid-size credit union with 17 branches in a four-county area specializing in the needs of federal employees and military. While superior customer service is your main priority and you live up to that standard, you realize that the investment in data and building security has not been as closely monitored. A major investment is necessary to meet the requirements set forth by the NCUA. The board recognized the need, and at the same time is obligated to maintain its commitment to delivering a return on its members. As your security systems become outdated and are in need of replacement, an overarching concern is the data security of your members.

Client Key Belief 2

The company you choose to partner with will need to demonstrate complete technical ability to handle the full scope of this project.

Client Key Belief 3

There are two choices: invest a smaller amount up front and a larger amount later, or invest a larger amount now and a smaller amount later. In our calculations, the combined investment will increase by almost 30 percent. If you choose to make the smaller investment at this time. While it may appear as a savings now, you are better off making the initial investment now to avoid the costly systems upgrades almost 30 percent if you choose to make the smaller investment at this time. While it may appear as a savings now, you are better off making the initial investment now to avoid the costly systems upgrades needed in upcoming years. If you implement the full Series XI today, there is no investment in Year 2, and the investment in Years 4 and 6 are reduced by a proposed 30 percent.

Prepare the Conditions

Date: February 9
Time: 3 to 4
Place (phone, in office, virtually):
Their offices – 18432 Coleman Blvd

Attendees (your team and their team):
Board of Directors
Head of IT – James Thalus
Head of Security – Samantha Wilson
Agenda items:
Open. Cover Beliefs 1, 2, 3.

Date to send pre-meeting confirmation to client:
February 9

Who

with summary and decision.

For Certification use only. Do not duplicate.
Example 2: Whelan Regional Medical Systems Closing Call Plan

End in Mind Decision
Describe the decision the client needs to make at the end of the meeting. The End is Mind is for you to be able to decide if SB&P can offer you better services than you are currently receiving.

Client Key Belief 1
Describe what the client needs to believe to make the End in Mind Decision with confidence. Whelan Regional Medical Systems needs a new partner who can scale to meet our needs.

Proof Points
Describe what the client needs to hear, see, and know to completely satisfy this belief. They have outgrown their current provider, whom they have been with for the past 10 years. They already have 11 locations throughout the tri-state area and are expected to experience rapid growth in the coming years.

Questions (yours/their)
Does SB&P offer a better set of services than we are currently receiving?

Response(s)
Discuss our strategy of accounting services—being sure to pay close attention to how they react when we cover the two critical areas in which we know we offer superior services than they are currently receiving. Present our dedicated team that will be assigned to their entire medical system, emphasizing the specialized training they have received in the new health-care initiatives over the past two years.

Client Objections
They may think we have a slight weakness on our team when it comes to servicing two of their specialty orthopedic-surgery centers.

Response(s)
Confirm our understanding of their criteria and discuss two case studies that show our experience and success: one in the County Hospital and one with the more complex tax situation involving Surgery Centers in the tri-state area.

Client Key Belief 2
Describe what the client needs to believe to make the End in Mind Decision with confidence. SB&P has experience in the health-care world and understands how to advise in light of all the new health-care regulations.

Proof Points
Describe what the client needs to hear, see, and know to completely satisfy this belief. We have relevant experience and deliver results. We can share case studies that are similar to their situation: County Hospital, and one with a more complex tax situation involving surgery centers of the tri-state area.

Questions (yours/their)
They may not immediately understand the discount approach for multi-site services we are proposing.

Response(s)
Discuss discount opportunities and multi-service opportunities that will allow them to use only services needed at each location. Acknowledge that confidentiality is extremely important and that a simple NDA is probably not going to offer them the confidence they may need to feel assured. Ask what they would need to feel comfortable moving forward and resolve accordingly.

Client Objections
They may think we have a slight weakness on our team when it comes to servicing two of their specialty orthopedic-surgery centers.

Response(s)
Confirm our understanding of their criteria and discuss two case studies that show our experience and success: one in the County Hospital and one with the more complex tax situation involving Surgery Centers in the tri-state area.

Client Key Belief 3
Describe what the client needs to believe to make the End in Mind Decision with confidence. Your pricing is in complete alignment with our expectations.

Proof Points
Describe what the client needs to hear, see, and know to completely satisfy this belief. Present our three-tier pricing strategy based on the detailed conversations we held with their people and their expectations.

Questions (yours/their)
Your proposal is too expensive.

Response(s)
If they don’t fully understand this aspect of the pricing structure, then it’s risk of appearing too expensive. Ask them to consider specific examples so they understand it with no questions remaining.
**Open (State the End in Mind Decision. • Summarize the Client Key Beliefs.)**

**Client Key Belief 1**
As a medical system in today’s health-care environment, Whelan Regional Medical Systems has unique needs. You’ve experienced an unprecedented amount of growth over the past decade and currently have 11 locations throughout the tri-state area. As tax laws have changed, and as you have grown, questions have arisen concerning your general accountancy policies as well as new, very specific tax ramifications. All of this has caused your Board of Directors to ask the logical question of whether you are receiving the best service and advice from your current provider. We are here to help you address your very real concern that you may have simply outgrown your current provider with whom you have been with for the past 10 years.

**Client Key Belief 2**
At SB&P, health care is our core competency. In addition to general accounting services provided by most firms, we are recommending a unique, specific solution set that has been optimized to handle the needs of your four core offerings: hospitals, surgical centers, ambulatory care, and dialysis treatment centers. In addition to our products and services, we have assembled a team that has an industry-leading average of nine years of tenure with our firm. These factors make us a solid strategic fit for your specific tax and accounting needs.

**Client Key Belief 3**
Our pricing is in complete alignment with your expectations. It is simple—one partner, one approach. Although you could assemble several specialty firms to handle your specific needs, we offer all these services under one roof—under one partnership. This strategy offers multiple benefits. The majority of our clients experience an overall cost savings of at least 15 percent and several are as high as 25 percent.

**Close (Summarize the discussion. • Call for the End in Mind Decision. • Propose next steps.)**

**Yes” Next Steps**
Discuss their protocol for follow-up after they have heard from all the parties who are presenting. Focus on the protocol of how we discuss any points they still have questions around as they make their decision.

**No” Next Steps**
Understand if it makes sense to stay in touch for future opportunities or if we should agree to free up each other’s time and resources. Understand the protocol of how we discuss any points they still have questions around as they make their decision.

**Prepare the Conditions**

**Date:** July 22

**Time:** 12–1 p.m.

**Place (phone, in office, virtual):** Our offices

**Agenda Items:**
- Opening, intro, present offering
- Present pricing strategy, discuss our experience, wins, losses, closing

**Date to send pre-meeting confirmation to client:** July 19

**Closing the Sale—Best Practices**

**Mindsat:** My role is to influence decisions to achieve win-win outcomes.

**End in Mind Decision**
What decision does the client need to make at the end of the meeting?

- Make the decision client-centric.
- Make the decision a single decision.
- Make “no” an acceptable answer.

**Client Key Beliefs™**
What would the client have to believe in order to make the End in Mind Decision with confidence?

Good decision making depends on our ability to identify and validate Client Key Beliefs to the client’s satisfaction.

**Proof Points**
How can your team and solution satisfy the Client Key Beliefs and help the client make the End in Mind Decision?

- View objections as an opportunity.
- Resist the urge to fix the objection.
- Avoid taking full responsibility.
- Explore the client’s resolution first.

**Open**
How do you set the context for a decision-making meeting?

- State the End in Mind Decision for this meeting.
- Summarize the Client Key Beliefs you will address.
- Invite dialogue and participation.

**Close**
How do you ensure that a decision will be made before the end of the meeting?

- Summarize the discussion.
- Call for the End in Mind Decision.
- Propose steps for a “yes” or a “no” decision.

**Prepare**
How will you influence the conditions for good decision making before each client meeting?

- Proactively influence logistics well in advance of the meeting.
- Be willing to push back on logistics that don’t enable a good decision.
- Focus on achieving win-win outcomes.
Example 3: Otte Partners Family Law Closing Call Plan

End in Mind Decision
Describe the decision the client needs to make at the end of the meeting.
The End in Mind for our time together today is for you to be able to decide if PrintTech has made a strong business case for you to choose us as your partner, or if you should pursue other options.

Client Key Belief 1
Describe what the client needs to believe to make the End in Mind Decision with confidence.

There is a compelling business case to change vendors and consolidate printing services.

Proof Points
Describe what the client needs to hear, see, and know to completely satisfy this belief.
Demonstrate that we have listened and understand their current situation and the challenges they are having.
Show them the potential cost savings of going with one vendor that can handle hardware and servicing, as well as the added benefit of our software that only we can offer.

Questions (yours/their)
They may ask if we are small enough to care, and large enough to service them well.

Response(s)
Ask them to help define the terms that will allow them to feel comfortable that we are paying enough attention to their needs. Develop a contract around those terms.

Client Objections
If we were to change how we handle printing, wouldn't it make more sense for us to outsource our printing services?

Response(s)
Acknowledge that outsourcing is a viable option for many organizations. Resolve by helping them understand that technology and printing is not their strength and that they are not big enough to realize major benefits from outsourcing.

Client Key Belief 2
Describe what the client needs to believe to make the End in Mind Decision with confidence.
The up-front investment in the toner-optimization software makes financial sense.

Proof Points
Describe what the client needs to hear, see, and know to completely satisfy this belief.
Demonstrate cost savings that our other clients have realized with our multifaceted approach. Discuss choices openly of going forward with and without the software so they realize we are not pressing only for software.

Questions (yours/their)
They may not value the long-term savings versus the up-front fee.

Response(s)
Discuss how the large expense of toner can be impacted relatively easily. Demonstrate multi-year savings versus up-front investment with simple ROI modeling.

Client Objections
They cannot justify such a large up-front investment in the toner-optimization software.

Response(s)
Acknowledge by stating that it is a large up-front expense that they smart to be concerned about. Resolve by presenting the overall cost savings of the software solution. Show how toner is the single biggest expense in their printing, and with three offices and over 100 staff, they can save thousands of dollars over the life of the contract.

Client Key Belief 3
Describe what the client needs to believe to make the End in Mind Decision with confidence.
We are the right fit for them.

Proof Points
Describe what the client needs to hear, see, and know to completely satisfy this belief.
We have more than four decades of experience and have many multigenerational clients. Our intent is to help them succeed.

Questions (yours/their)
What makes you different from your competitors?

Response(s)
Understand their criteria for an ideal solution provider and demonstrate how we can help them address their key concerns.

Client Objections
They may ask pricing for just our printer hardware without software and servicing.

Response(s)
Although we would not walk away from that business, it's far less profitable for us. Resolve by explaining that we have competitive advantage with just printers. Emphasize that consolidating printing services with a software solution would save money compared to their current scenario.
Close the Sale—Best Practices

**Mindset:** My role is to influence decisions to achieve win-win outcomes.

**End in Mind Decision**
What decision does the client need to make at the end of the meeting?
- Make the decision client-centric.
- Make the decision a single decision.
- Make "no" an acceptable answer.

**Client Key Beliefs™**
What would the client have to believe in order to make the End in Mind Decision with confidence?

Good decision making depends on our ability to identify and validate Client Key Beliefs to the client’s satisfaction.

**Proof Points**
How can your team and solution satisfy the Client Key Beliefs and help the client make the End in Mind Decision?

- Connect intellectually with the client.
- Connect emotionally with the client.
- Completely satisfy the Client Key Beliefs.
- Help the client make the End in Mind Decision with confidence.

**Client Objections**
How will you anticipate and resolve client questions and objections to influence good decision making?
- View objections as an opportunity.
- Resist the urge to fix the objection.
- Avoid taking full responsibility.
- Explore the client’s resolution first.

**Open**
How do you set the context for a decision-making meeting?
- State the End in Mind Decision for this meeting.
- Summarize the Client Key Beliefs you will address.
- Invite dialogue and participation.

**Close**
How do you ensure that a decision will be made before the end of the meeting?
- Summarize the discussion.
- Call for the End in Mind Decision.
- Propose steps for a “yes” or a “no” decision.

**Prepare**
How will you influence the conditions for good decision making before each client meeting?
- Proactively influence logistics well in advance of the meeting.
- Be willing to push back on logistics that don’t enable a good decision.
- Focus on achieving win-win outcomes.