



Qualify the Sale - Three Ways to Win

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One of the many challenges **salespeople** face is getting to the finish line, only to find out they have not won anything. This can be a source of aggravation or a wake-up call that they are doing something wrong. Recently I was training a group of **insurance professionals** and they recounted numerous stories of how they gave a wonderful **presentation**, only to discover that the potential client could not buy their products or services. Why? They did not “*set the table*”. I use this analogy because setting the table was my particular job when I was growing up, and I had to do my job before the family could eat. If we use this analogy in the sales arena, it may create a visual image that drives the point home. Just as we have to set the table before we can eat, we also must have favorable circumstances before we can proceed with a sale. If these sales professionals had asked a few more questions, they would have realized that their potential client did not qualify in the first place. Let me preface this statement with a disclaimer. We do not want to qualify the potential client so much that we never leave the office. Balance is everything. Below are some helpful guidelines to properly “*set the table*”.

Are you talking to all decision makers? If you are talking to a business, who makes the ultimate decision, and can they be part of the discussion? If you are speaking with a husband and wife, are they both present? Whenever possible, speak with all decision makers when giving your **sales presentation**.

Can they pay for the product or service? In the insurance industry, the majority of sales premiums are paid by bank draft. If your potential client does not have a bank account, then this would not be possible.

Can they qualify for the **benefit**? Again, this sounds so elementary; however, there is nothing worse than making a sale only to find out that the potential client is not a candidate for your product or service.

I believe that time is your most valuable possession. Don't waste it. As the sales professional, you want to ensure that the table is set before you eat. The best way to accomplish this is by asking enough questions to determine if everyone and everything is in place for you to proceed and succeed.

Keith Benton is the founder and owner of Benton Marketing Strategies, a company that specializes in online insurance sales training. He has been involved in insurance sales and training for the past 25 years, and has had the privilege of training hundreds of insurance sales professionals with a simplistic 5 step approach to the sales of insurance products. Visit www.agentsalestrainer.com to learn how to get started with Sales Training from Benton Marketing Strategies!