



## Next Best Action | Moving the Conversation Forward

STEP 1: CONNECT	STEP 2: CREATE INTEREST	STEP 3: COMPELLING PRESENTATION	STEP 4: CREATE DESIRE	STEP 5: CLOSE
<input type="checkbox"/> Acknowledged customer: <ul style="list-style-type: none"> <li><input type="checkbox"/> Non-verbal connection</li> <li><input type="checkbox"/> Friendly greeting</li> <li><input type="checkbox"/> Smile</li> <li><input type="checkbox"/> Handshake</li> <li><input type="checkbox"/> Eye contact</li> <li><input type="checkbox"/> Confidence</li> <li><input type="checkbox"/> Thank you for coming</li> <li><input type="checkbox"/> Acknowledged children</li> </ul>	<input type="checkbox"/> Used a purpose permission transition to move into questioning ("my purpose at this time...") <ul style="list-style-type: none"> <li>• Asked relevant questions, including:               <ul style="list-style-type: none"> <li><input type="checkbox"/> Open-ended</li> <li><input type="checkbox"/> Closed-ended</li> <li><input type="checkbox"/> Reciprocity</li> <li><input type="checkbox"/> Hypothetical/Thought-Provoking</li> <li><input type="checkbox"/> Magical</li> </ul> </li> </ul>	<input type="checkbox"/> Matched the product to the customer's needs <ul style="list-style-type: none"> <li>• Used value transitions:               <ul style="list-style-type: none"> <li><input type="checkbox"/> "What that means..."</li> <li><input type="checkbox"/> "What that means to you..."</li> <li><input type="checkbox"/> "The real benefit to you..."</li> </ul> </li> </ul>	<input type="checkbox"/> Summarized what the product or service would do for them <ul style="list-style-type: none"> <li>• Managed concerns, objections or complaints               <ul style="list-style-type: none"> <li><input type="checkbox"/> Diffused emotion</li> <li><input type="checkbox"/> Empathy</li> <li><input type="checkbox"/> Avoided fighting words</li> <li><input type="checkbox"/> Isolated the real objection</li> <li><input type="checkbox"/> Turned the objection into a question</li> </ul> </li> </ul>	<input type="checkbox"/> Asked for the sale <ul style="list-style-type: none"> <li><input type="checkbox"/> Avoided asking too quickly</li> <li>• Closing strategy:               <ul style="list-style-type: none"> <li><input type="checkbox"/> Instruction close</li> <li><input type="checkbox"/> Incentive close</li> <li><input type="checkbox"/> Alternate choice</li> <li><input type="checkbox"/> Minor decision</li> <li><input type="checkbox"/> Assumed close</li> <li><input type="checkbox"/> Pending doom</li> <li><input type="checkbox"/> Just asked</li> </ul> </li> </ul>
	<input type="checkbox"/> Listened <ul style="list-style-type: none"> <li><input type="checkbox"/> Without interruption</li> <li><input type="checkbox"/> Clarified for understanding</li> <li><input type="checkbox"/> Asked enough questions</li> </ul>	<input type="checkbox"/> The sales rep was able to: <ul style="list-style-type: none"> <li><input type="checkbox"/> Explain the features</li> <li><input type="checkbox"/> Share the benefits</li> <li><input type="checkbox"/> Make the benefits relevant to them</li> <li><input type="checkbox"/> Explain technical terms</li> <li><input type="checkbox"/> Anticipate and answer common objections and concerns</li> <li><input type="checkbox"/> Provide proof with examples, demonstrations, testimonials, facts, etc</li> </ul>	<b>Manager/Observer Feedback</b>	
	<input type="checkbox"/> Prepared for the compelling presentation, with a "big fat claim" or interesting commercial or teaser <i>(If a service call)</i>	<input type="checkbox"/> Used reciprocity for the trial close <input type="checkbox"/> Watched both verbal and non-verbal cues	Date/Time of Observation:	
	<ul style="list-style-type: none"> <li>• Managed concerns, objections or complaints               <ul style="list-style-type: none"> <li><input type="checkbox"/> Purpose - permission</li> <li><input type="checkbox"/> Diffused emotion</li> <li><input type="checkbox"/> Empathy</li> <li><input type="checkbox"/> Avoided fighting words</li> <li><input type="checkbox"/> Isolated real objection</li> <li><input type="checkbox"/> Turned objection into question</li> </ul> </li> </ul>	Observer Name:		
	<input type="checkbox"/> Obtained the needed information <input type="checkbox"/> Tried suggestive selling with "by the way" <input type="checkbox"/> Did they leave happy and smiling?	Rep Name:		
		Rep Location/Department:		
		Sale made? <input type="checkbox"/> Y <input type="checkbox"/> N If No, Reason:		
		Problem resolved? <input type="checkbox"/> Y <input type="checkbox"/> N What did the Rep do well?		
		What could they have done better?		
		Other comments and observations:		