

- **Statement of Intent**

Your intent should be to Discover more about them and share some information about yourself, to ask a few questions and explain your role, and uncover ways to work together.

- **Build Trust**

To build trust you must be Professional in appearance, grammar, manners; Knowledgeable of your service and competition; Committed to offer solutions and not just “selling”; and be a resource of information.

- **Uncover Needs**

To uncover needs, your questions need to be varied and targeted. They should include questions of: Permission, Fact Finding, Feeling Finding, Best/Least, Ideal Situation, Tell me more, and a Catch All.

- **Clarify “Needs Agreement”**

The needs agreement is a Summary of current situation, Summary of Needs, and a Checking Question in order to confirm that you understand the customer’s needs.

- **Offer Solutions**

When offering solutions: be a problem solver and personally interested, focus details to specific needs, explain advantages, and explain personal benefits. Do not list services, but give solutions.

- **Make a Recommendation**

When making a recommendation, Use First Person, Be Specific, and Wait for customer response.

- **Grow the Referral Relationship**

To continue to grow the relationship, set a specific time and agenda to follow up, call or e-mail additional resources, maintain relationship regardless of immediate sales outcome.