



# MAKING THE SALE

Prospect to Contract

**3.7**  **DESIGNS**

3.7designs.com / @37designs

[www.3.7designs.co](http://www.3.7designs.co)



I am Declan O'Neill

I am an Account Manager  
& Project Manager for  
3.7 DESIGNS.

**Hello! Not a sleazy sales guy.**

Photo Credit: <http://www.momeomagazine.com/business-101-enough-with-the-sleazy-sales-pitch-already-how-not-to-become-a-direct-sales-pariah-in-your-social-circle/>



I help organize WP Ann Arbor and WordCamp Ann Arbor.

## Community Involvement!

- WP Ann Arbor 2010 - 2015
- WordCamp Ann Arbor 2014, 2015
- WordCamp Detroit 2011, 2012, 2013



**Professional selling involves a series of seven distinct steps**

Finding and qualifying potential customers.

## Prospecting

Prospecting is finding and qualifying potential customers. Qualifying is the process of determining whether a potential customer has a need or want that the company can fulfill, and whether the potential client can afford the product.

Preparing for the initial contact with a potential customer.

## Preparation

Preparation involves preparing for the initial contact with a potential customer. You will need to collect and study relevant information such as product descriptions, prices, and competitor information.

First face-to-face / phone / email interaction with potential customer.

## Approach

Approach is the first face-to-face interaction you will have with the potential customer. The idea behind all of these approaches is to get the prospect involved in the interaction quickly.

Listening to pain points of the potential customer and demonstrating how your product can meet those needs.

## Presentation

Presentation is actively listening to the needs and wants of the potential customer and demonstrating how your product can meet those needs and wants.

Focus on addressing a prospect's concerns.

## Handling objections

- Price
- Timeline
- Team size
- You are not local, I want to come into your office
- Successful salespeople learn how to overcome objections through preparation and having the right information at hand to address them.

Identifying closing signals from the prospect that indicate it's decision time.

## Closing

- Closing involves identifying closing signals from the prospect that indicate it's decision time.
- Gaining commitment
- Can we have your business?

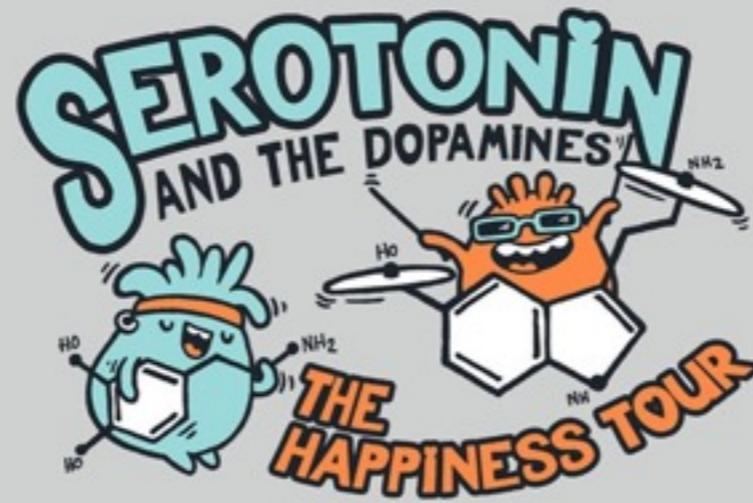
Create a solid relationship for future sales.

## Follow-up

Follow-up is building a long-term relationship with your customer for purposes of repeat sales. For example, you make contact with the customer sometime after the sale and make sure the product was received and is in good condition. Again, the idea is not to sell at this stage, but to create a solid relationship for future sales.

- New Client
- Returning Client
- Client Referral

## 3 Types of New Business



New Client

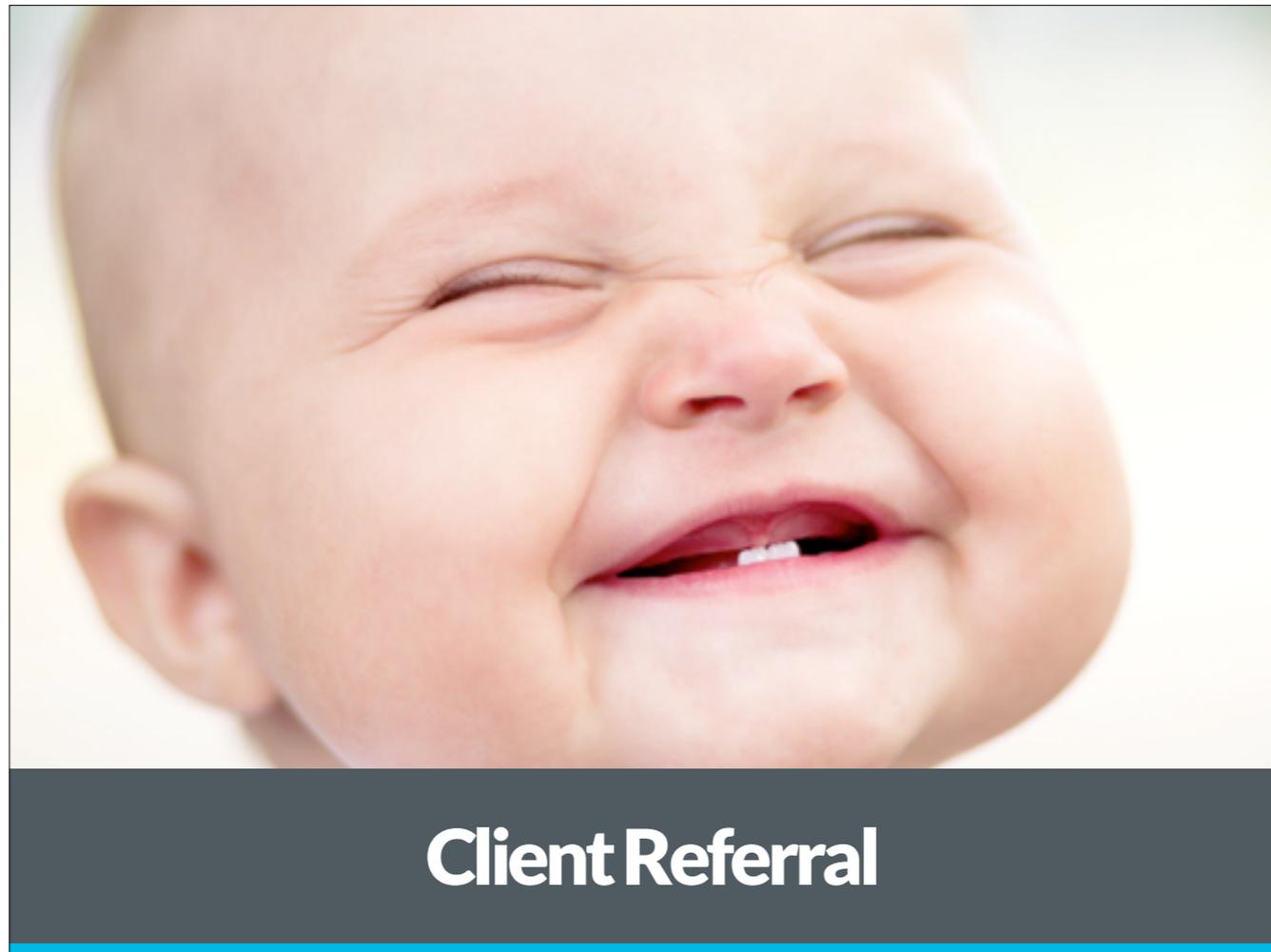
New client sales make me happy :)



## Returning Client

Returning client sales make me really happy.

Steven Gerrard, 2005 Champions League. Vs AC Milan in Istanbul



Client referral sales are the best kind of sale. Your client respects you and your work enough to put someone they know in touch with you.

When a client recommends you to a potential client, you carry a responsibility to that referrer. You need to do right by them.

If you mess up, you risk ruining 2 relationships.

If you are really lucky a prospective client will send you a project brief.

**Yay!**

<https://3.7designs.co/request-a-quote/>

If you are really **UNLUCKY** a prospective client will send you an RFP.

**Not Yay!**

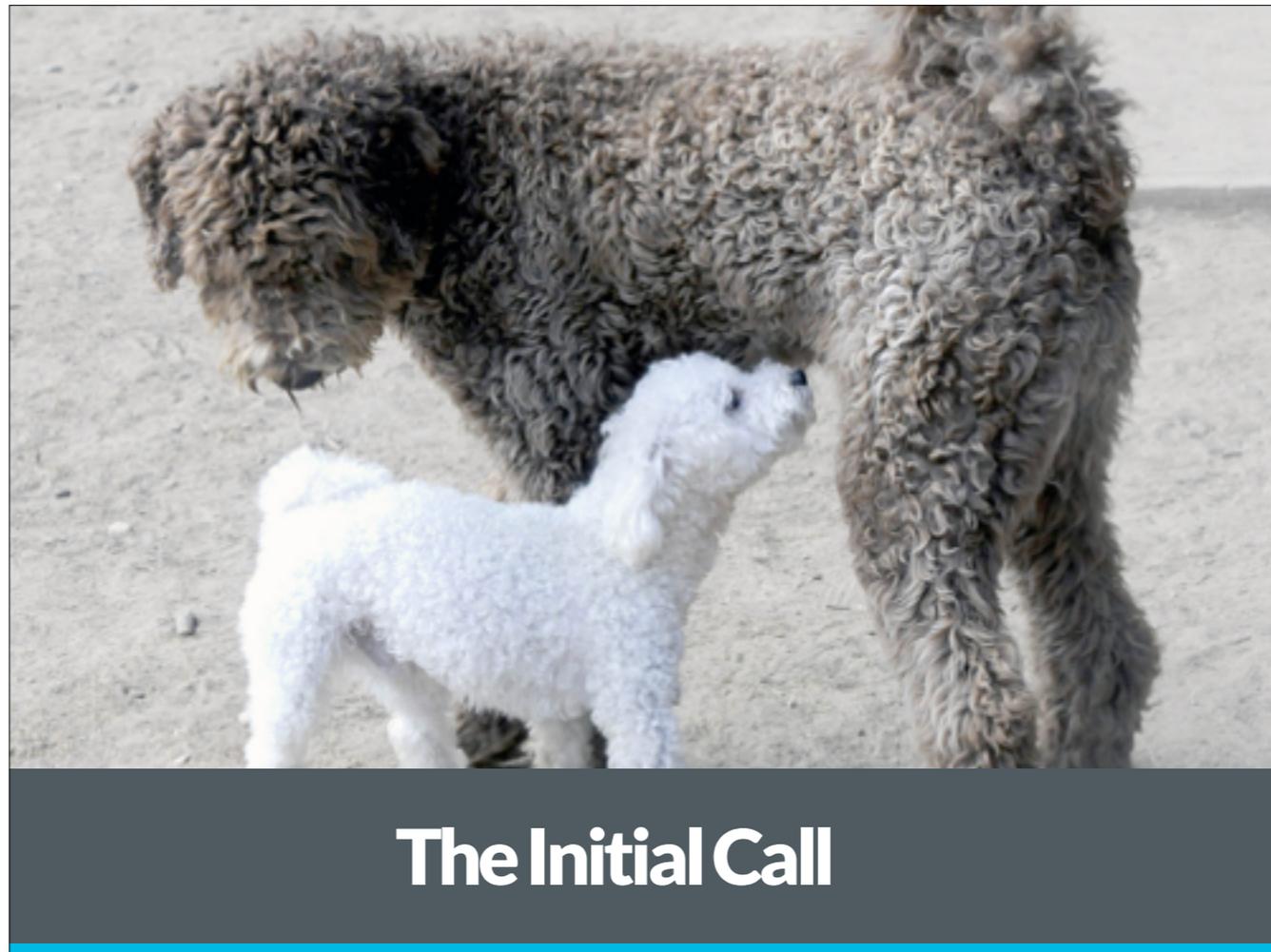
Many RFP's from large organizations are sent to a large number of agencies on an approved vendor list. i.e. 50+ agencies could be receiving the RFP.

Replying to an RFP can be quite a tedious process.

Many times large organizations are required to get a least 3 bids. Sometimes they already have a partner in mind or they go with the lowest bidder.

- Prospects fills out your “Request a quote form”.
- Account Manager reviews the project details and does some initial research.
- Sets up a meeting with the potential client to discuss their needs.

## Web Agency Sales Cycle



## The Initial Call

A potential client is trying to decide whether they want to work with you, and you're trying to decide whether you want to work with them.

Is the project and client a good fit for your company?

- Ask the prospect to summarize the project
- Ask Timeline
- Ask Budget

If these 3 things align, continue the conversation. If not, close the call.

## First 5 Minutes

During first 5 minutes of the sales call, you should clarify the project requirements, launch date, and how much money they have to spend.

Based on the project scope, if the timeline is too tight or the budget is too low, thank them for their time and close the call by explaining why you are not a good fit.

Note: If the budget is good, but the timeline is tight, suggest a rush fee.

- They value your skills and see you as an expert
- They have clear project goals
- Personality Fit
- We like each other

## Choosing the Right Clients

- Won't tell you their budget
- Says "that should be easy"
- Complains about their old web agency
- They ask for spec work
- Unrealistic expectations
- They send you an RFP/RFQ
- Equity as payment
- Promise of future work
- Haggles over price
- Asks for free work

## Identifying Problem Clients

Note: "They send you an RFP/RFQ" is not always an indication of a problem client. There are many great clients that send RFP's.

There are certain situations when specific types of clients e.g. Government or Educational, will require you respond to an RFP, which can be tedious, and if your agency is selected, you will be required sign their contract and abide by their billing terms which probably do not match yours.

There is a mathematical equation that can predict what will make you happy.

“what we expect and how strongly we expect it.”

$$\text{Happiness}(t) = w_0 + w_1 \sum_{j=1}^t \gamma^{t-j} CR_j + w_2 \sum_{j=1}^t \gamma^{t-j} EV_j + w_3 \sum_{j=1}^t \gamma^{t-j} RPE_j.$$

Meet and exceed your clients expectations!

## The Happiness Equation

<https://www.psychologytoday.com/blog/neuronarrative/201408/the-happiness-equation>