Virtual Selling Checklist: **TAKE THE LEAD**



With virtual selling it's more important than ever for sellers to **Take the Lead** and guide a proactive and deliberate sales conversation and process. Here's what you need to do to succeed with virtual selling broken down into three categories: **selling**, **meeting technology and experience**, and **productivity**.

Selling

Here are guidelines and tips geared specifically for the selling part of virtual selling, especially where different from face-to-face (F2F) selling.

General



- ☐ Create advantage: Exhibit virtual best practices to stand out and win (follow this checklist)
- ☐ You are your brand and so is your workspace; meticulously curate visual, audio, content, and rhythm of experience
- ☐ **Think 2D engagement** and provide stimulus to maintain engagement throughout
- ☐ **Use visuals:** Video, screen shares, e-collaboration, virtual white boards, etc.
- ☐ **Use email:** Communicate around meetings with purposeful, engaging, customized email
- □ **Leverage other tech** beyond virtual meeting software (meeting scheduling technology, e-sign, video, consolidated document sharing, etc.)
- ☐ **Don't over complicate:** If tech complicates and confuses, stop using it
- ☐ Ask for support if you're uncomfortable with the tech or need visual help; sellers who do will take a big lead over those who don't

Prospecting



- ☐ Think <u>WAVE</u>: Winner's Mindset, Attraction Campaigns, Value, Execute
- ☐ **Customize and personalize outreach** to buyers to enhance connection
- ☐ **Routine is critical:** Prepare, schedule, and calendar prospecting time
- Overcome solitary/WFH disadvantages:
 Isolation and distractions (family, pets, ambient noise, life in general) make it more challenging to concentrate; productivity can suffer
- ☐ **Use multi-modal outreach** such as email, LinkedIn, and phone

Meeting Preparation



- ☐ **Use RAIN Sales Conversation Planner** to prep for virtual meetings of all types
- ☐ Send agenda, video, and screen expectations
- ☐ Make instructions clear for how to enter the meeting; use one-touch mobile dial-ins
- ☐ **Do your homework:** Research and know what's going on in the buyer's world
- ☐ Follow pre-meeting tech checklist so all tech is ready to go (video, webcam, audio, bandwidth, office scene, lighting, recordings, screens, files ready to share, etc.)
- ☐ **Record:** Ask for permission and be aware of industry security laws

Meeting Management



- ☐ **Open strong** with rapport, story, and engagement; be immediately buyer-focused
- ☐ **Mechanics of open:** Review agenda, note tech options (e.g., virtual white board), review timing, ask what buyers want out of the meeting
- □ **Collaborate:** Involve the buyer; use virtual white boards and ask questions to generate discussion and get buy-in
- ☐ **Check in:** Ask periodically if people are getting what they expect
- ☐ **Mechanics of close:** Know when you will wrap, check in with enough time before the wrap to ask perception questions (e.g., Did you get what you hoped for? Did we miss anything?)
- ☐ Close with a next step: Book the next meeting on the call
- ☐ Follow up with written summary

Making the Impact Case **Building Rapport** ☐ Know the impact model: Prepare questions to Remember the <u>4 Principles of Rapport</u>: gather data to make your impact case Empathy, Authenticity, Similarity, shared **E**xperience (EASE) Build the impact case live: Use virtual white boards or take impact case notes; plug into ☐ Create time/space for rapport; be deliberate impact modeler to show ROI; screen share ☐ Kick off with, "How are you?": Lead with Engage with perception questions: Ask, "Is empathy and listen this worthwhile? Could this happen? Is this right? ☐ **Ask specific rapport questions:** Proactively ask What are we missing?" non-work questions to humanize discussion ☐ **Make the emotional case:** What's at stake? ☐ **Don't be mechanical:** Laugh and have fun; What will the buyer gain or lose? remain professionally balanced Address how you'll minimize risk ☐ **Keep video on:** Seeing you builds rapport/trust □ Demonstrate capability, integrity, and **Driving Insight** dependability ☐ **Build rapport with email:** Add personality to ☐ **Research:** Ask questions of others, research the your emails; rapport is not just for meetings firm, run Win Labs before meetings to figure out ☐ Offer standalone catchups in between what ideas might have the greatest impact business-purpose meetings ☐ Share videos, case studies, overviews, white papers, etc. with your ideas in advance Demos Tell **Convincing Stories** to educate and inspire; stories are incredibly connecting ☐ **Prepare:** Tailor the demo □ Inspire with new ideas early Stick to six-minute segments to pause and Provide an 'aha moment' that's new (to the check in buyer), noteworthy, or non-intuitive ☐ Check in: Ask, "How is it going for you? Too ☐ **Provide detailed summaries** and follow up with much detail? Too little? Pace okay? Are you more information to support new ideas learning what you want? What am I missing?" ☐ **Use multi-media:** Show a video, show your New Reality and product live with webcam, use graphics online; **Proposal Presentations** go beyond click-and-show slide presentation ☐ Watch the buyer's body language: Keep your ☐ **Orchestrate:** Engage from start to finish; create eyes on the video; if you sense disengagement complete experience to be value-adding and or anything but rapt attention, check in impressive to buyers **Uncovering Aspirations/Afflictions** Follow the **Convincing Story** framework **Learn about attendees:** Who will be there, what they're like, how they consume information; Be organized: There's less tolerance for tailor the meeting plan to match aimlessness in conversation Run tech checks for important meetings (e.g., Prepare custom questions to demonstrate your

© RAIN Group

are critically important

Keep questions in view where only you see them

☐ Ask questions beforehand via email to engage

☐ **Be inquisitive:** Heightened presence and focus

Use on-screen visuals to spur needs sharing

research and uncover specific needs

and tailor meeting to be most valuable



finalist presentations)

Us? Why Trust?

☐ Address the <u>4 Whys</u>: Why Act? Why Now? Why

Paint a picture of the **New Reality**

Make your ROI case graphically

Meeting Technology & Experience

Here are guidelines & tips specifically focused on the technology of leading virtual sales meetings.

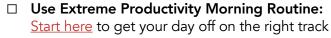
Vi	ideo	Au	ıdio
	Use video for every meeting Use an HD webcam and test prior to meeting Adjust head position: Top of head should be 10% to 15% from the top of screen Look into the camera Position camera to eye level or slightly above Stay in the visual		Get a high-quality external mic or headset Dial in when bandwidth or audio quality are poor Test sound prior to meetings Turn off notifications Minimize home noises such as barking, voices, lawnmowers, etc. Mute typing noise Be aware of mute: Take yourself off mute before needing a reminder
	Manage face lighting so it's even with medium to light brightness and no dark shadows Reduce backlighting and overheads that create	Ba	nckground Two core options:
	dark faces and glare Use purpose-built video lights such as ring lights or desk lights and dimmers Use color temperature adjustments for hue control; stay more white/blue than orange Green screen: If room lighting is hard to control,		1. Prepared actual setting 2. Green screen with digital background Review background for professionalism: Declutter and clean area Be authentic: Real office settings are best; set look and scene to project desired brand
Yo	use face lights and green screen with digital background photo		Limit background motion Use green screen for digital background quality
	Manage color contrast in clothing choices: Avoid green with green screens; avoid black tops with dark backgrounds		
	Think "important live meeting": Dress as if you were live; if unsure, dress up one level		
	Avoid busy patterns		
	Remain 1.5 to 2 feet from the camera		
	Stay present: Keep eyes on the camera, don't check phone, email, second screen, etc.		
	Keep good posture		
	Use facial expressions: Don't overdo facial expressions (gets distracting) and don't not move at all (seemingly disengaged); most sellers are too understated and should project more		

Productivity

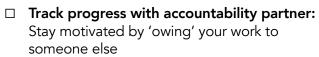
When selling virtually, it's important to keep yourself focused and productive. This is a condensed list of hacks from <u>9 Habits of Extreme Productivity</u>.

Motivation





☐ Plan actions weekly and review daily



☐ Say "3, 2, 1, Go!" to get started on difficult tasks

☐ **Use positive self-talk** to boost your motivation, emotional status, and productivity

☐ Change your habits: Identify habits that hinder productivity and change them

Execution



- ☐ TIME Sprint: Execute in the Zone and be hyperproductive by putting on a stopwatch and not doing anything else for at least 20 minutes
- ☐ **Sprint through distraction:** Write down distractions that pop up in your head then stay on task; don't task switch
- ☐ **Move your phone** and close messaging apps
- ☐ **Relay:** Extend hyper-productive time by doing four successive sprints
- ☐ Say, "3, 2, 1, Stop!" to discontinue any activity taking you away from executing a more important one

Training



- ☐ **Be proactive with your coach:** Enlist your manager or another person to help you improve
- ☐ **Record your calls:** With permission, record then have calls analyzed for improvement
- ☐ Take control of your learning: Find time and programs to improve your skills and knowledge

Focus



- Obsess Over TIME: Take Treasured, increase
 Investment, minimize Mandatory, eliminate Empty
- ☐ Calendar your investment TIME
- □ Tackle your <u>Greatest Impact Activity</u> first thing
- □ Do less: Think, "If it's not gung ho, it's no"; make sure only important activities stay on your to-do list
- ☐ **Turn off alerts:** They distract buyers during sales meetings and distract you when they're on
- ☐ **Signal "Do Not Disturb":** Make sure others know not to interrupt when you're concentrating; wear noise-canceling headphones

Workspace



- □ **Declutter:** Clutter can increase distractibility
- ☐ **Use two or three screens** when you work
- ☐ Work in a quiet and private space
- ☐ **Shut the door** to aid concentration and minimize distractions

Energy and Self-Care



- ☐ Practice mindfulness for mental health
- ☐ **Stay social:** Make time to connect with family and friends or attend a virtual meet-up
- ☐ **Take Treasured TIME** for yourself doing things you love to fill your tank
- ☐ **Be active:** Maintain energy to execute by walking, exercising, or doing anything that keeps you moving

© RAIN Group

Provided as part of The Ultimate Virtual Selling Toolkit. Reproduction permission required.

Virtual Selling Checklist: **PRODUCTIVITY**



When selling virtually, it's important to keep yourself focused and productive. This is a condensed list of hacks from <u>9 Habits of Extreme Productivity</u> and the book Not Today: The Productivity Code Revealed.

70. /	г.	•	tior	
- IN /	A4	TAN TAN	4101	9
10/1		1 1/2	1 16 11	
T 4 7		.ı v u		т,



- ☐ Use Extreme Productivity Morning Routine:

 Start here to get your day off on the right track
- ☐ Plan actions weekly and review daily
- ☐ Track progress with accountability partner:
 Stay motivated by 'owing' your work to
 someone else
- □ Say "3, 2, 1, Go!" to get started on difficult tasks
- ☐ **Use positive self-talk** to boost your motivation, emotional status, and productivity
- ☐ Change your habits: Identify habits that hinder productivity and change them

Execution



- ☐ **TIME Sprint:** Execute in the Zone and be hyperproductive by putting on a stopwatch and not doing anything else for at least 20 minutes
- ☐ **Sprint through distraction:** Write down distractions that pop up in your head then stay on task; don't task switch
- ☐ Move your phone and close messaging apps
- □ **Relay:** Extend hyper-productive time by doing four successive sprints
- ☐ Say, "3, 2, 1, Stop!" to discontinue any activity taking you away from executing a more important one

Training



- ☐ **Be proactive with your coach:** Enlist your manager or another person to help you improve
- ☐ **Record your calls:** With permission, record then have calls analyzed for improvement
- ☐ Take control of your learning: Find time and programs to improve your skills and knowledge

Focus



- Obsess Over TIME: Take Treasured, increase Investment, minimize Mandatory, eliminate Empty
- □ Calendar your investment TIME
- ☐ Tackle your Greatest Impact Activity first thing
- □ **Do less:** Think, "If it's not gung ho, it's no"; make sure only important activities stay on your to-do list
- ☐ They distract buyers during sales meetings and distract you when they're on
- ☐ **Signal "Do Not Disturb":** Make sure others know not to interrupt when you're concentrating; wear noise-canceling headphones

Workspace



- ☐ **Declutter:** Clutter has been shown to increase distractibility
- ☐ Use two or three screens when you work
- ☐ Work in a quiet and private space
- ☐ **Shut the door** to aid concentration and minimize distractions

Energy and Self-Care



- □ Practice mindfulness for mental health
- ☐ **Stay social:** Make time to connect with family and friends or attend a virtual meet-up
- ☐ **Take Treasured TIME** for yourself doing things you love to fill your tank
- □ Be active: Maintain energy to execute by walking, exercising, or doing anything that keeps you moving

© RAIN Group

Provided as part of The Ultimate Virtual Selling Toolkit. Reproduction permission required.