The Account Plan

CASKEY
Grow Your People. Grow Your Business.

Checklist Series

The purpose of this document is to help listeners to the Advanced Selling Podcast or The Ultimate Sales Chick podcast to improve their sales and sales planning skills.

10333 N. Meridian Street
Suite 101
Indianapolis, IN 46290
317.575.0057

www.caskeyone.com/blog
www.advancedsellingpodcast.com
www.ultimatesaleschick.com

We need checklists to help us remember. Our minds aren't built to handle all the things that must get done.

Here's where we ended on the podcast.

1. **CONSTITUENT INVENTORY.** Look at all the people inside your client company who can be benefit from a relationship with you. Look at the organizational chart and identify which ones you need to know. Don't get stuck in ONE place. One option is to "score the relationship." And know what the pains of each person you call on are?

2. **'HAND ME THE KEYS' MANIFESTO.** Put yourself in the place of the company. Would you have to think about what to do inside your prospect company if they handed you the key? Don't be afraid to recommend things. Tell them what "other CEO's" are thinking about. Don't SELL the CEO.

3. **HAVE A STORY FOR EVERY NEW PRODUCT**. Don't assume that they'll buy from you just because they buy other stuff from you. Start with "why you created it" "what you have observed" etc "What are the problems it solves?" Don't get sloppy. Get intentional.

4. **HAVE AN ANNUAL RELATIONSHIP MEETING.** This is an annual or semi-annual meeting that you have with all of your top clients—where you discuss how to make the relationship better. It might mean you ask them to rate you—or you ask them to give you 3-5 ways you can improve. You might also be invited by them to rate their competency.

5. **GOOGLE ALERT.** Set Google alerts for all of your top clients. Know when they blog about things...or when they're quoted...or what trends they're facing. Let Google work for you. You must have a Google account, but they're free. Or, if you have key constituents, do a Google Alert on their name. It will keep you in constant touch with where they're showing up online.

6. **READ AND DROP.** Read voraciously. Read articles, websites, listen to blogs. And when you come across something that might be of interest to them, drop it in their file then send it to them. I have one vendor who does that occasionally and it's a nice touch. But don't just "FORWARD" it to them via email. Take the time to drop it in an envelope.

7. **INTERVIEW THEM.** I love this one (so it must be good :)) If you have a blog, then do a "client spotlight" on them. Use their picture...their story...why they use you...what it has done for them. Quote them. Use their words. No better way to build rapport than to promote them in some way.

8. **INTRODUCE THEM TO OTHERS.** This is about building them into your "network web." Not with any other goal than just introducing them to your networks. Take a couple of your clients out to lunch...they'll enjoy knowing others that work with you. And you'll be expanding their network.

9. **CALL CONSTITUENTS RANDOMLY**. Have a Random Client Call List (up in your office) with names of people who work at your client—but with whom you don't connect often. You'll get to know more about your client's business from your secondary contacts than from your main contact. Not because they're hiding something from you—but they have different perspectives.

10. **PAY FOR AN ONLINE SEMINAR**. *Nothing spells 'caring' like the gift of learning.* Help your client learn by buying him/her access to online events—or physical events. Make it fit.

Your Hosts

BILL CASKEY

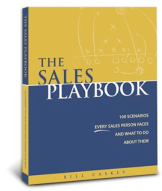
Bill Caskey is a sales experimenter and trainer. He's worked with B2B sales groups for over 20 years.

He and his team of coaches train sales forces around the world in the art of communicating their value in a rapidly changing world.

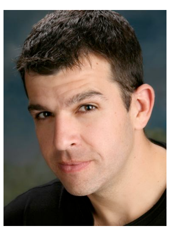
Caskey's philosophy has three components: 1) that today's buyer has more power than ever before and to be successful selling to him, the sales person must control the sales process; 2) that a sales person's success depends more on how he thinks than what he says; and 3) a sales person must always be working on their skills and educating themselves to the ways of the new world.

Bill has worked with over 100 different industries in his 20-year sales training career.

Bill also contributes to www.InsideTheSalesMind.com blog frequently. You can access the podcast at iTunes or at www.AdvancedSellingPodcast.com.



He has authored three books and many audio CD's: Same Game New Rules, published in 2001, The Sales Playbook in 2005, and Rewire The Sales Mind, with a release date of January 2010.



BRYAN NEALE

Bryan Neale has a portfolio of clients around the world. He's worked in a variety of industries in his tenure at Caskey, including healthcare, consumer goods, software and technology, financial, and manufacturing.

Bryan's background includes a stint at Proctor and Gamble with stops in the financial industry and distribution.

He recently co-authored Rewire The Sales Mind with Bill Caskey.

In his spare time, he's a Division I college football official and spends time with his family of six.

Our Services

We are a sales development firm located in Indianapolis, Indiana. You might know us as podcasters but that's a part time gig for us. Our team at Caskey, which includes Bryan, Bill, Brooke Green and Terry Sarbinoff work with companies in the sales and leadership disciplines.

From one-day events to ongoing coaching, we work with companies in a variety of industries and circumstances.

We are also doing more coaching on the phone/web/Skype as well.

If you would like to speak to us about your sales team, we'd love to connect. Call 317.575.0057 and speak with Kathy Macaluso about setting up a time to talk.

CASKEY INSIDER. For a few dollars / month, you can have access to virutally ALL training we do online. Go to www.caskeyinsider.com