

The Performance-Based Planned Maintenance Sales Process

NorthBoundary

- | | |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <ul style="list-style-type: none"> a. Planning Strategies & Prospecting b. Preparing & Setting Appointment(s) c. Facilitating The First Meeting d. Survey, Qualifying & Estimating e. Confirming Information f. Making Recommendations g. Closing – The Agreement h. Start-up, Customer Reviews | <ul style="list-style-type: none"> - Prospecting - Appointment Setting - First Call - Survey & Pricing <ul style="list-style-type: none"> - Financial Analysis - Proposal
(Close the Sale) - Retention |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

Tools	Sales Process	Action
Territory	a. Planning & Prospecting	Research
Phone Script Active Prospect List	b. Setting Appointments	Telephone Calls Database Entry
Flip Chart Capabilities Overview Recap Letter	c. First Meeting Capabilities Building Ops Costs	Build Rapport Generate Interest Plan Of Action
Questioning Survey Sheet Ops Cost \$\$ Contractor Report	d. Surveying, Estimating Needs Pain Business Goals	Gather Information, Needs, Hurts Needs, Objectives Survey & Financial
Cost Analysis Survey Results, Budget \$\$ Report Data	e. Confirming Verifying Information Budget Numbers	Review Needs Preliminary Recommendation Review Report
Proposal Presentation Documents	f. Recommendations Financial Justification Proposing	Final Proposal Financial Justification & Buying Decision
Agreement Document	g. Closing - Agreement	Closing Signing
The Reports	h. Start-up, CSR	Validation