HELP TO GROW.

MANAGEMENT COURSE



WINNING MORE CUSTOMERS: CONVERTING LEADS TO SALES RESOURCE BOOKLET

WEBINAR DATE: 29 OCTOBER, 2026

Funded by UK Government

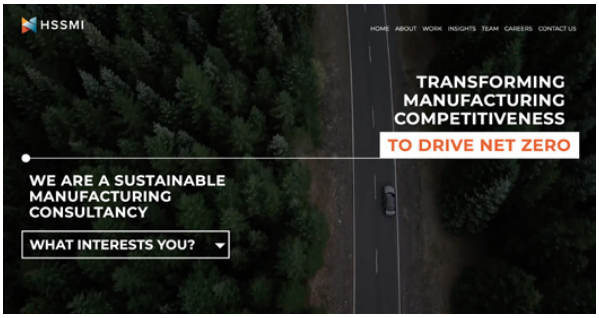
Delivered by SMALL BUSINESS CHARTER

HOW DOES SELLING VARY ACROSS DIFFERENT PRODUCTS AND SERVICES?









DIFFERENT TYPES OF SALE



TRANSACTIONAL: GOLD BULLION BY TELEPHONE

PHASE	CONNECT	LISTEN AND LEAD	INVESTMENT OPTIONS	CONCLUDE
Headline	Ensure positive and trustworthy first impression	Assess buying motives and lead conversation appropriately	Confirm/explain advantages of our offer	Confirm the transaction and ensure next steps are clear
Routines	Audible smile Personal intro for credibility Use names/titles How can I help you? Customer type: Investor, collector, or gifter Agenda setting Moments of Trust (MOT)	Focused questions to discover needs/ requirements Adapt according to customer type and TransAct guidelines Active listening to the last drop Explain the WHY behind questions before asking Bring in Bullion by Post (BBP) insights Six attitudes of persuasion Fraud/scam radar	Explain options and pros/ cons of each OR Validate client's choice Help to buy attitude Proud of price attitude Check whether the client wishes to proceed and finalise the transaction Sow seeds for future investment ideas	Explain what happens next Plan next contact moments according to customer type Praise the client for investing with BBP Create account and/or send lead pack Moments of Trust (MOT)
Essential checks	Buying or selling? Investment amount? Which product?	Motives and £/€ known Source of £/€ known	Spreads discussed Flexibility requirements	Client aware of checks/ process/timelines

CONSULTATIVE: PE SERVICES TO SCHOOLS

	CONTACT	MEET	PROPOSE	FINALISE	DELIVER	CARE
Description	Contact the school based on solid preparation	Make an excellent first impression, identify needs and influencers and achieve objectives	Suggest appropriate next steps and keep the sales process moving	Stay in contact to cross the line	Over deliver our service promise, network and cross sell	Retain customers and reduce competitor influence
Routines	Visit school website Check Association for Physical Education/Ofsted sources Check cluster and partnership links and active references Well prepared first contact Update Customer Relationship Management system (CRM)	Top quality meeting management Active listening and smart questions Positioning as a primary school PE expert and reframe with Aspire insights Dig the pain Decision Making Unit (DMU) influence map Update CRM	Present proposal in person Take control of next steps Update CRM	Contact creatively Stay close to contacts Confirm decision Discuss and confirm next steps Update CRM	Ensure our promise is delivered and surpassed Network in the school and develop our influence map Plan for next best service Update CRM	Renew Service Level Agreement (SLA) in good time Demonstrate added value Aspire vs competition Carry out feedback meeting Update CRM
Checklist	❑ Pre-call prep done	❑ Game plan prepared ❑ DMU known ❑ Next meeting agreed	❑ Tailored proposal presented in person	❑ Yes/No decision ❑ Has pre-delivery contact been scheduled?	❑ School is an active reference ❑ Second service presented	❑ Next steps confirmed ❑ >90% annual contracts retained

STRATEGIC: SOFTWARE SOLUTIONS TO CAR DEALERSHIPS

CONNECT → INVESTIGATE → CONVINCE → CLOSE → EMBED → EXPAND

HEADLINE	Initiate conversation Build trust	Discover pain and gain Map decision makers	Create urgency for change Win supporters	Secure contract Agree embed plan	Deliver promised value Plan expand steps	Delight and retain Cross-sell new
Routines	Preparation: LinkedIn checks Active References Industry insights Meeting agenda Sow seeds with product portfolio Commitment objectives Face to Face (F2F) or remote? Find out product history: Who should be in the selling team We always influence!	Meeting(s) to: Gather intel Find pain or gain Discover DMU and process Check IT rules ODBC licence? Hint at our value Demonstrate Cooper Solutions credibility Introduce APG Competitor check Commit to next step	Identify a champion Educate and test champion Create urgency Test budget Access Economic Buyer Co-present the business case / case for change Demo product Check-in with product owners	Work with the economic buyer to secure timescales Work with champion to build embed plan Persistent and consistent follow through to close Proud of price attitude	Relentless focus on delivering the promised results Network widely for cross-selling Sow the seeds for next steps Map the DMU for cross-sell	Use every opportunity to build relationships with customers Return to the investigate phase to scope a new product opportunity Scrum principle Use product cards Strategic business reviews and Product Portfolio Who should be in the review?
This phase complete when…	Meeting in diary and agenda agreed Call prep done Connect via LinkedIn	We understand pain and gain We know the DMU and process We have a next meeting planned	We have a champion We have a meeting with economic buyer Solution presented	Timescales for contract close agreed Embed plan is agreed Pricing presented and accepted	Product installed Customer using product Customer satisfaction checked	We have 3+ contacts in the account A cross-sell plan is in place

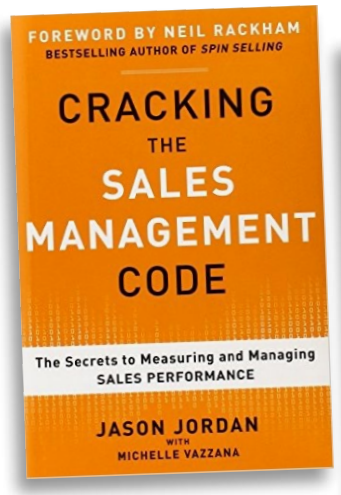
INTRODUCING COMMITMENT OBJECTIVES

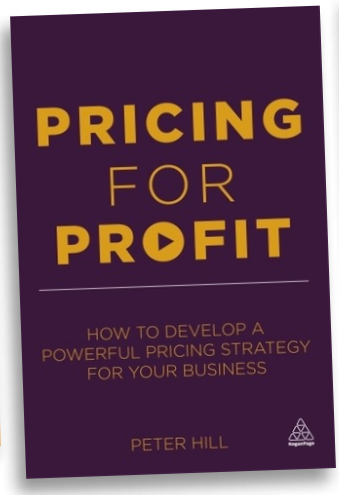
Definition of a commitment objective:

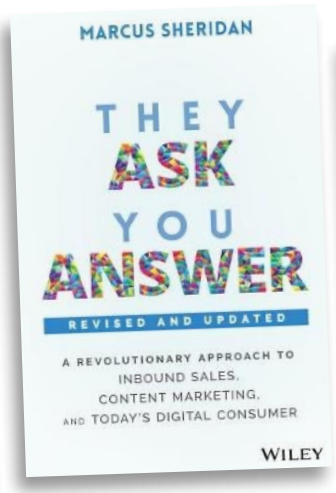
1. We prepare it prior to a sales meeting to define what the ideal next step should be.
2. It is concrete and results in a specific date entered into both our diary and the customer's diary at the end of the sales meeting.
3. It helps us advance our sales process / account management position.
4. We can explicitly ask our customer to agree to it during the sales meeting.

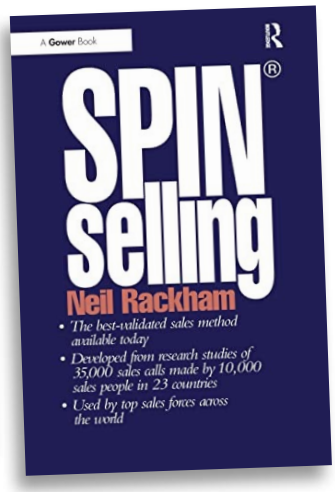


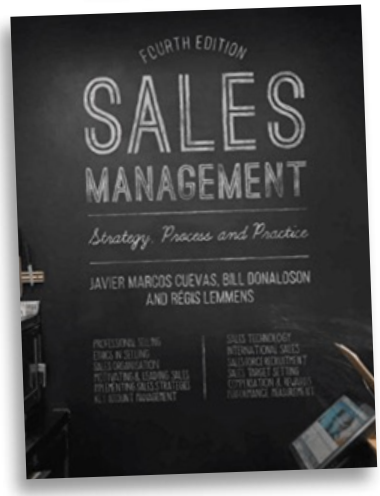
FURTHER READING FOR START-UPS / SMES













MEETING PREPARATION EXAMPLES

Excellence comes from the consistent application of good routines.
Checklists enable us to be well prepared for every commercial meeting

What essential preparation can we consider?

- Customer research:
  - Website - what sector are they in?
  - What do they make?
  - What is their turnover and number of employees?
  - New and latest blogs
  - Sector news
  - Which machines do they have already?
  - When were they bought?
  - Who do we know on LinkedIn?
- Outlook invite - meeting in both our diaries
- Agenda for meeting agreed with customer and invite
- A commitment objective and a plan to reach it
- Written open questions to lead the meeting
- Documents/presentations
- Examples of other installations/testimonials
- Expected objections and concerns, and how to address them
- Customer contact details in case of delay
- My positive attitude!

How can we ensure we are investing our valuable time on the best opportunities?

What?
What is the customer's need?
What is the customer's preferred control system?
What are the essential financial/payback conditions?

Why?
Why do they need to invest?
Why can't they use their existing machines?

Where?
Where is it going to be shipped?
Where is it going to be installed?

Who?
Who are the champions, influencers, and decision makers?
Who is our competition?

How?
How will the cutting process work?
How much budget has been allocated?
How will they fund the investment?

When?
When do they need the machine?

PRESENTING PROPOSALS/QUOTES

Rule no.1 Present proposals in person/via web-meeting

Do not send significant proposals by email!

Why? Which section will clients go to first if we are not with them to guide their attention? How do we manage their reaction if they have "sticker shock"?

Rule no.2 Link back to needs when presenting

Reference needs identified in previous conversations to show how our proposal brings benefits.

Rule no.3 Interactive discussion

The goal of presenting a proposal is to arrive at the best possible solution to offer value to a client, NOT just to close the deal. By asking for feedback as we present, it gives us a chance to adjust the final version to offer maximum value.

Rule no. 4 Secure the "Three Yeses"

1st Yes: "Have we captured your needs accurately?"

2nd Yes: "Is this the right solution for you?"

3rd Yes: "Are you happy to go ahead?"

By securing three yeses, we help move towards commitment!



GLOSSARY OF TERMS USED

TERM	EXPLANATION
MOT (Moments of Trust)	The phone call where an agent builds trust with a potential customer who wants to confirm they're speaking to the real company, not a scam setup. The agents are trained to refer callers to reliable online resources (such as the Royal Mint) where they can check phone numbers and credentials.
DMU (Decision Making Unit)	The group of people who influence and are accountable for making a purchase decision. Most large B2B purchases involve several people to help to make a good decision. If salespeople don't understand who is involved in a buying decision, they may be excluded from critical conversations.
APG	The name of a specialist internal group of people who look at the automotive market.
Economic Buyer	An individual who signs off a B2B purchase. They may be the budget holder, company owner, or someone else responsible for the final purchase decision.
Champion	An individual within a customer organisation who supports your proposal and helps advocate for it internally.
ODBC Licence	This is an open-source library of driver information that companies can pay a subscription to access. In this sector, it affects which products can be offered, so the salesperson should check this early in the sales process.
BBP Insights (Bullion by Post)	Intelligence held by the firm which is valuable to customers.
Proud of Price	When a salesperson is 'proud of price', they state fees/ prices confidently without apology. This increases the perception of value. If a salesperson appears uncomfortable or uncertain when discussing prices, it can reduce the perceived value of the product or service.
Help-to-buy attitude	This approach focuses on helping customers make informed decisions. Rather than focusing solely on making a sale, it emphasises understanding customer needs, exploring options, and identifying the most suitable solution.