

# 02

# Planning

## Warm up

Read the quote. Are all the meetings in your company necessary? Discuss with a partner.

*I think there needs to be a meeting to set an agenda for more meetings about meetings.*

Jonah Goldberg, writer and journalist

## LEARNING OBJECTIVES

### Sales communication skills

Predicting customer behaviour;  
Planning future appointments;  
Setting objectives

### Reading

A blog post about how to extend sales;  
Emails organizing travel plans

### Listening

A meeting discussing sales prospects for the new sales period; A meeting to delegate responsibilities

### Language

Phrases and collocations to talk about targets; Modals for possibility; Future forms; Emphatic phrases to talk about future plans/action

## Another quarter, another target

1 Read the blog post and discuss questions a–c with a partner.

### How to extend sales

Everybody wants to exceed sales targets, but by how much can you realistically expect to extend sales? Is the target feasible and how are you going to meet it?

Here's a simple checklist of where you can find more sales.

- 1 Think about your existing customers. Go over your client list and look for new opportunities. What will your customers need this quarter and how can you supply it?
- 2 Where are your prospects? Is marketing sending you regular leads? Have you asked all your contacts for referrals?

At the beginning, a big target can seem daunting, but if you systematically apply these simple points, you'll be closing deals before you know it.

- a Does the blog post give good advice?
- b Are there any other tips you would give for salespeople to meet or exceed a target?
- c How similar is the advice to your planning process?

2 Find the words in the blog post in 1 with the same meaning as the words a–g.

- |                    |                     |
|--------------------|---------------------|
| a outperform/_____ | e frightening/_____ |
| b increase/_____   | f use/_____         |
| c achievable/_____ | g sealing/_____     |
| d review/_____     |                     |

3 Match the verbs and adjectives in 2 to the nouns in the box to make collocations.

a client list	a deal	a strategy	sales	targets (x3)
---------------	--------	------------	-------	--------------

- |         |         |
|---------|---------|
| a _____ | e _____ |
| b _____ | f _____ |
| c _____ | g _____ |
| d _____ |         |

**4** Think about how you prepare to meet a new target. Use the mind map to help you organize your ideas. Then discuss with a partner.



## The planning meeting

**1** **03** Clearway provides design services to the engineering industry. The sales team is discussing future sales opportunities. Listen to the meeting and make notes in the table about the opportunities they discuss.

Company/Country/Region	Sales opportunities
Solway Services	
Fulsons Ltd	
Shill Consulting	
Brazil	
Asia	

### Grammar tip

#### Modals for possibility

\*We use different modal verbs to show how possible we think something is.

They **could/might** place an order.  
= The speaker is about 40% certain they will place an order.

\*We can also use *will* and *won't*, and we can also include adverbs to help clarify how certain we are.

They **will** ... (100%), They **will probably** ... (about 70%), They **won't** ... (100% not OR 0%), They **definitely will** ... (100%)

**2** Look at the information in 1 and underline the correct word or phrase in each sentence.

- a** Solway Services *probably won't / will probably / might* increase their order soon.
- b** If Solway Services reorder, it *could / will certainly / is likely to* be a significant increase.
- c** Fulsons Ltd *probably won't / might not / definitely won't* place a new order in the short term.
- d** Jane *will / might / is unlikely to* be able to get a referral from Pawel for Shill Consulting.
- e** Shill Consulting *won't / could / will* want to place an order.
- f** There *will possibly / probably won't / will definitely* be several new projects starting in Brazil.
- g** Susana thinks there *might not / probably won't / certainly won't* be any sales in Brazil at the moment.
- h** Susana thinks there will be sales in Asia, but they *probably won't / will / might* contribute to this year's results.

**3** **03** Listen again and discuss your answers with a partner.

**4** Tell a partner about opportunities in your territory or market. Use the questions to help you and try to use the language in 2.

- a** What do you think will happen in your region in general next year?
- b** Do you anticipate sales to rise or fall?
- c** Do you expect any key customers to change their purchasing habits?
- d** If this happens, how can you protect your sales figures?













## On the road



- 1 Tell a partner how you organize your travel plans.
- 2 Read the emails and underline the correct verb forms.



   
**To:** Kirsty  
Hi Kirsty,  
(a) *I travel / I'm travelling* to Bergen for three days from the 18th of next month. (b) *I'd return / I return* on the 20th. Could you organize the hotel and flights, please?

Marcus

   
**To:** Marcus  
Okay, Marcus.  
(c) *I'll make / I'm making* the booking later today as I have a meeting now. Can you let me know if you'd prefer to arrive on the morning of the 18th or the evening of the 17th?  
Kirsty

   
**To:** Kirsty  
Thanks, Kirsty.  
(d) *I'll give / I'm giving* a presentation at 9 am on the 18th so it (e) *will be / would be* best if I arrived on the 17th. Is that okay?

   
**To:** Marcus  
Hi Marcus,  
Here are the details of the flight and hotel. Let me know if this is okay and (f) *I book / I'll book* everything.  
Kirsty

   
**To:** Kirsty  
Hi Kirsty,  
Everything is fine. Can you make the booking? (g) *I'll travel / I'm travelling* for the next two days so (h) *I'm printing / I'll print* the ticket at the weekend.  
Thanks,  
Marcus

- 3 Match the verbs in 2 to the meanings (1–3).

- 1 a planned future action
- 2 a single unplanned future action
- 3 a suggestion for a future situation

- 4 Tell a partner about your future travel plans. Try to use the language in 2.

- 5 Write an email to someone in your office asking them to help you organize a future travel arrangement.

## It's my job to make a decision, not necessarily the *right* decision!



### 1 Discuss the questions with a partner.

- a Who makes most of the decisions in your department?
- b How much input do team members have?
- c Is it more important for decisions to be correct or for everyone to have input?

### 2 04 Listen to the sales meeting and answer the questions.

- a What is the reason for the meeting?
- b What is the problem?
- c What is the proposed solution?
- d How well do you think the meeting was managed?
- e Would you have done anything differently?

### 3 04 Listen to the sales meeting again. Does the sales manager give clear instructions?

### 4 Look at the two pairs of sentences and answer the questions.

- 1 We need to decide today how to divide the leads marketing have supplied.
- 2 What we need to decide today is how to divide the leads marketing have supplied.
- a Which sentence (1 or 2) is more emphatic?
- b Why is it more emphatic?

### 5 Look at the listening script on page 59. Find other examples of how Marion, the sales manager, uses this technique.

### 6 Rewrite the sentences using *What + main verb + the correct form of be*. Use the example to help you.

- a I want to allocate 15 leads to each salesperson.  
What *I want to do is allocate 15 leads to each salesperson.*
- b We talked about customer retention yesterday.  
What \_\_\_\_\_.
- c We have to decide the sales target for next year.  
What \_\_\_\_\_.
- d I need you to confirm the numbers attending the demonstration.  
What \_\_\_\_\_.
- e Can you all send me your forecasts by Friday?  
What \_\_\_\_\_.
- f We're going to finalize the sales literature today.  
What \_\_\_\_\_.

## Over to you

- 1 Work in small groups. Think of three or four issues you currently have in your team. Discuss these together, listen to everyone's ideas and choose the best ones.
- 2 Turn to page 50 and roleplay the scenario there.



Robert Harrison  
Marvel Property Solutions



Lisa Catto  
The Back Office



Phil Berg  
BNI UK & Ireland



Wiktor Kostrzewski  
Publishing

## Before you watch

Discuss the questions with a partner.

- What do you think *word of mouth* means? How is it connected to sales?
- Do salespeople need to manage customer expectations? How can they do this?
- Who should decide sales targets? Why?

## While you watch



1 Watch the section on *Lead generation* and tick the things they talk about.

- cold calling  word of mouth  a personal approach  advertising   
networking  social media  referral marketing



2 Watch the section on *Timewasters* and match the advice (a-f) to a speaker. Write *L* for Lisa, *R* for Robert and *P* for Phil.

- Find out if you're talking to the person who can make decisions. \_\_\_\_
- Have clear prices. \_\_\_\_
- Ask yourself if the customer is a timewaster. \_\_\_\_
- Check they can afford your product or service. \_\_\_\_
- Make it clear how your company compares to the competition. \_\_\_\_
- Enquiries lead to sales. \_\_\_\_



3 Watch the section on *Following up* and answer the questions.

- What does Robert think is the best way to follow up a lead?
- What does Lisa suggest focusing on when following up?



4 Watch the section on *Sales targets* and decide if the statements are true (T) or false (F). If they are false, correct them.

- Wiktor's sales managers have no sales experience. T / F
- Wiktor's managers understand if targets are achievable. T / F
- Robert sets sales targets annually. T / F
- Robert uses sales forecasts to set targets. T / F



5 Watch the section on *Timewasting prospects*. Make notes and work with a partner to retell Wiktor's story.

## Natural speech



Extr. 1

1 Watch the extract of Lisa discussing *Lead generation*. Why does she emphasize the words in bold?

'My company **generates leads** by doing a lot of **networking** and **relationship building**. So, by **meeting people** and **developing a relationship**, we build the **credibility**.'



Extr. 2

2 Watch the extract of Robert talking about *Following up* and circle the words he emphasizes.

'Once you've met a prospect, the best way I've found to follow up is to stay human, to give them a call and to build up that relationship.'

3 Underline the stressed syllable in the words with two or more syllables that Robert emphasizes.

4 Take turns to practise saying Lisa's and Robert's sentences in 1 and 2 with a partner.

## After you watch

Discuss the questions with a partner.

- Do you use social media to generate leads? Does it work?
- Do you agree with Phil that there are no timewasters? Why / Why not?
- How do you 'stay human' with clients? Is it important?



## 01 Prospecting

### Qualifying prospects

1 Complete the questions with the words in the box.

allocated arrange ask decision maker update

- a Are you planning to \_\_\_\_\_ your technology?
- b Could I \_\_\_\_\_ how many handsets you're changing?
- c Can we \_\_\_\_\_ a time to talk?
- d Have you \_\_\_\_\_ a budget yet?
- e Can I ask if you're the only \_\_\_\_\_?

### Following up prospects

2 Match the sentence beginnings (a-e) to the sentence endings (1-5).

- a Well, you mentioned you were
- b You said that's something
- c So, I'd love to come in
- d Do you think we could organize a
- e So I'll send you an email now to confirm

- 1 presentation for you and the other key decision makers?
- 2 and present the full system to you.
- 3 concerned about the cost of replacing the system.
- 4 the presentation and give you some more details.
- 5 you're interested in, right?

3 Underline the correct options to complete the sentences.

- a Is a contract with us something you'd like to *see* / *look* into?
- b I'll / I get in touch by email early next week.
- c You raised concerns *to* / *with* costs, but let's discuss discounts.
- d Could I drop *in* / *around* to see you on Thursday?
- e Let's set *in* / *up* a presentation at your offices next week.
- f We've recently come *up* / *over* with a whole range of new products.

## 02 Planning

### Predicting customer behaviour

1 Decide if the sentences are correct. If they are wrong, correct them.

- a We'll probably increase the travel budget.

- b It might not to be a big problem.

- c They won't probably increase their order.

- d It will definitely be a big order.

- e They could placed a new order next week.

### Planning future appointments

2 Complete the email with the correct future form of the verbs in brackets.

+
↺
🗑️

Hi Greg,

How are you?

I <sup>(a)</sup> \_\_\_\_\_ (visit) Paul at Worthington's next week. We <sup>(b)</sup> \_\_\_\_\_ (finalize) the contract and I'm fairly sure he <sup>(c)</sup> \_\_\_\_\_ (sign) it this time. There may be one or two issues when we meet and I <sup>(d)</sup> \_\_\_\_\_ (call) you if there are any significant problems. I <sup>(e)</sup> \_\_\_\_\_ (travel) to the conference in Tokyo after that so I <sup>(f)</sup> \_\_\_\_\_ (see) you until next month.

Thanks,

Ann

### Setting objectives

3 Rewrite the sentences using *What* + the correct form of *be*.

- a I want to set the sales budget today.  
What \_\_\_\_\_.
- b We talked about the regional budgets yesterday.  
What \_\_\_\_\_.
- c We have to cut the advertising budget today.  
What \_\_\_\_\_.
- d We're going to identify the key issues involved.  
What \_\_\_\_\_.

### Sales skills checklist

- I can ask questions to qualify sales prospects.
- I can follow up prospects by telephone and email.
- I can get follow-up meetings with prospects.
- I can use possibility language to predict customer behaviour.
- I can use a range of future forms to talk about travel plans.
- I can use emphatic language to set objectives and delegate responsibilities.