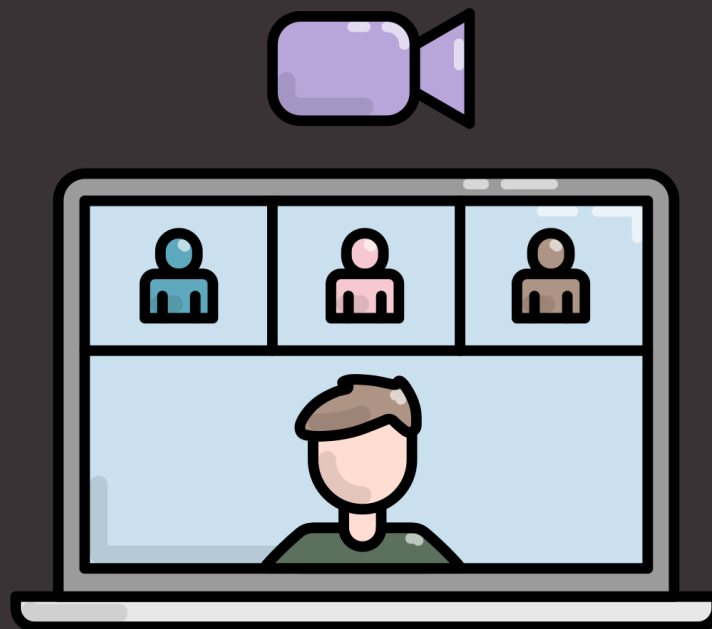


VIRTUAL SELLING CHECKLIST



FROM YOUR FRIENDS AT



DELIVERING OVER 30,000
VIRTUAL PRESENTATIONS EACH MONTH

THE SETUP



The first step to shifting to virtual selling is ensuring you have a proper setup. Below are 5 key elements to getting your virtual selling setup ready to rock.

- Set up a **Zoom** account (or another video conferencing tool) and practice sharing your camera and your screen to get comfortable with the process. **Check out Zoom's full list of How-To.**

- Set up a home office work space with a **neutral background**, a **good headset**, and a **generally quiet space**.

With zoom, you can use **virtual backgrounds** if you don't have a neutral one. Check out **this guide** on how to change your background.

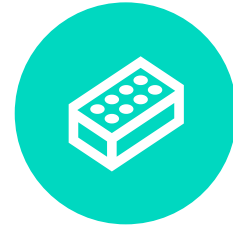
- Confirm that your internet connection is solid. **Zoom has a great guide** on checking your connection, and tips to improve.

- Organize your day using a shareable calendar like **Google Calendar** or use a tool like **Calendly** if you want to automate appointment scheduling.

- Make closing the deal easy by allow for digital signature so customers can sign contacts remotely. **DocuSign** is a popular and trusted option.

STEP 1

CREATE



Once you have your virtual selling war room (aka home office) setup, it's time to ensure your sales presentation is ready to engage and nudge prospects to close.

- Create** an engaging narrative and overall presentation that will serve as the core of your sales cycle. Your goal should be to offer a presentation that inspires, educates, and empowers. View our samples for **inspiration**.
- Leverage tools to make your sales presentation appear more professional and interactive, such as **Ingage**, to create a more immersive presentation and emotional experience. It's hard to kick someone out of their kitchen. It's easy to just turn off their computer... you need to grab their attention is keep it!
- Build your presentation to emphasize your product and how it will solve your customer's needs. It's more important than ever that you have a **great discovery** so you can tailor your presentation.
- Add interaction to your presentation, such as high quality before/after photos, video to break down complex steps of your process, or deep dives into product areas.
- Include your reviews from websites like **GuildQuality** to build trust, and show prospects live people in their neighbourhood that have been happy with your work.

STEP 2

PRESENT

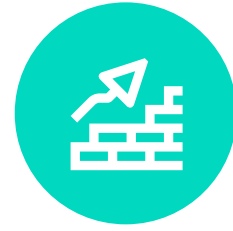


It's the moment of truth. You have your home office setup, you have your presentation, and now it's time to actually present.

- Be respectful of your prospect's schedule by beginning the call on time. Build buffer into your calendar between meetings to ensure you always have extra time.
- Record the call using Zoom's built-in record function, so you can capture key notes, or if you're a sales manager, use recorded calls for coaching.
- Kick off the meeting with something memorable, like a surprising statistic or some humor in your personal introduction.
- Listen carefully as the customer discusses their needs and weave qualifying questions into the conversation as you go. This will be critical to tailoring your presentation and aligning your products to their pain points.
- Be mindful of your pacing. It's natural to increase pace when presenting virtually. When you finish a major point, pause so your prospect has time to digest.
- Summarize the three main points you want your prospect to remember before you conclude. Confirm they agree to these main points.
- Initiate the close -- end with a sale or sell them on the next steps. Either way, clearly define what they can expect from you in the coming days.

STEP 3

FOLLOW UP



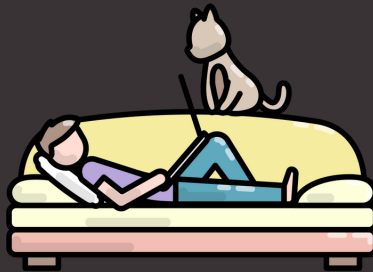
While the goal is a one-sit close (virtually of course), there will need to be a follow up whether a sale is made or not. This is key.

- Evaluate your call by watching the recording. Note what you did well and what can be improved. Capture all of the pertinent notes in your CRM (whether that's software like **MarketSharp**, a notebook, or a spreadsheet).
- Review next steps and deliver on any action items to follow up. Do this ASAP... prospects won't wait around and many companies lose prospects to competitors that act with more urgency. You should be in a position to follow up same day as the meeting.
- Stay top of mind with your prospects by **sharing** your presentation with them after the call. Using a tool like **Ingage** means you can share a link with them, and then **measure** whether or not they actually opened it!
- When your customer does buy, be sure to follow up with them to make sure they're happy with the purchase and answer any questions they may have afterwards.

Thank You

STEP 4

**TO MAKE THE SHIFT TO
VIRTUAL SELLING, VISIT:**
get.ingage.io/prevail



 **Ingage** ×  **MarketSharp**

Trusted by:

