

Coaching Notes – Selling With Email – 0511-01

General guidelines regarding the use of email in the sales process:

A. When a client/prospect contacts you using email with an initial product or rate inquiry:

- Generally speaking, you would want to encourage/lead that inquirer to the phone or an appointment before dealing with them on email.
- If, after attempting to get them on the phone or to an appointment, it becomes clear they would rather use email as the preferred method of communication, then stay on email.
- If the client/prospect wants to stay on email, continue with the same sales process you would over the phone or in person. *The Buying Cycle does not change just because the medium of communication changed.*

How should you respond to an initial product or rate inquiry that begins on email?

1. If you have their phone number, call them.
2. If you do not have their phone number, or you cannot reach them when you call, email a reply that suggests the best way to get the client what they are asking for is to speak with them on the phone or meet with them in person.
 - **The reason?** *While it is not impossible to do an effective sales interview on email, it's significantly less effective than doing it on the phone or in person. The goal when you get an inquiry is not simply to answer their question; it's to treat them like a buyer and ask questions that will help you determine the best product for the client's situation.*
 - Remind your team of the following:
 - By making an inquiry, we can safely assume the person 1) has a need, 2) is going to make a decision shortly, 3) is not happy wherever their business is now and 4) thinks your company's reputation is acceptable.
 - That they are the product experts (on your products). When someone asks a rate question, it is only his or her starting point – the first decision. They have many other decisions to make. Just giving out rate information without asking questions to make sure the client is considering the best product for their situation is poor service.
 - That the client starts on email for the reasons mentioned earlier (*they prefer email to phone or in person, it is more convenient for them to make contact after hours, or they are somewhat nervous about making contact and email affords them a way to keep some distance and control over the inquiry*). Make the point that **just because the person starts on email doesn't mean they will stay on email**. Many people will switch to the phone or agree to an appointment if asked. Don't assume they want to stay on email until they tell you that that is their preferred method of communication.

Sample email response (asking for appointment):

Dear Mr. Client, Thank you for your email. Our rates are very competitive right now with what's being offered in the market area. The best way to get you the best rate I possibly can would be to meet quickly one day. That way I can get a better sense of what you are doing and then go to work to get you the best product to fit your situation at the best rate possible. Would you be open to meeting me sometime in the next week or so to discuss your situation?

Sample email response (asking for phone call):

Dear Mr. Client, Thank you for your email. Our rates are very competitive right now with what's being offered in the market area. The best way to get you the best rate I possibly can would be to have a quick conversation on the phone. I can get a better sense of what you are doing and then go to work to get you the best product to fit your situation at the best rate possible. What would be the best time and number to reach you at?

B. When to use email as an outgoing sales tool:

- When you are having a difficult time reaching someone on the phone.
- Many times people screen calls because they come in at inopportune times of the day. Email is a fantastic way to arrange for a time to meet a client, either in person, or on the phone.

Sample email (initiated by us, asking for phone call):

Mr. Client, I'm sorry I keep missing you when I have called. The reason for my call was to speak with you about an idea I had that could save you some money (insert any potential benefit). When would be a good time where we could chat quickly on the phone? I'm available (*list the times you are available and your contact information*). Please send me a quick reply and I'll be happy to arrange a time that's convenient for us to talk.