

Virtual Selling Checklist: TAKE THE LEAD



With virtual selling it's more important than ever for sellers to **Take the Lead** and guide a proactive and deliberate sales conversation and process. Here's what you need to do to succeed with virtual selling broken down into three categories: **selling, meeting technology and experience, and productivity.**

Selling

Here are guidelines and tips geared specifically for the selling part of virtual selling, especially where different from face-to-face (F2F) selling.

General



- Create advantage:** Exhibit virtual best practices to stand out and win (follow this checklist)
- You are your brand** and so is your workspace; meticulously curate visual, audio, content, and rhythm of experience
- Think 2D engagement** and provide stimulus to maintain engagement throughout
- Use visuals:** Video, screen shares, e-collaboration, virtual white boards, etc.
- Use email:** Communicate around meetings with purposeful, engaging, customized email
- Leverage other tech** beyond virtual meeting software (meeting scheduling technology, e-sign, video, consolidated document sharing, etc.)
- Don't over complicate:** If tech complicates and confuses, stop using it
- Ask for support** if you're uncomfortable with the tech or need visual help; sellers who do will take a big lead over those who don't

Prospecting



- Think WAVE:** Winner's Mindset, Attraction Campaigns, Value, Execute
- Customize and personalize outreach** to buyers to enhance connection
- Routine is critical:** Prepare, schedule, and calendar prospecting time
- Overcome solitary/WFH disadvantages:** Isolation and distractions (family, pets, ambient noise, life in general) make it more challenging to concentrate; productivity can suffer
- Use multi-modal outreach** such as email, LinkedIn, and phone

Meeting Preparation



- Use RAIN Sales Conversation Planner** to prep for virtual meetings of all types
- Send agenda, video, and screen expectations**
- Make instructions clear** for how to enter the meeting; use one-touch mobile dial-ins
- Do your homework:** Research and know what's going on in the buyer's world
- Follow pre-meeting tech checklist** so all tech is ready to go (video, webcam, audio, bandwidth, office scene, lighting, recordings, screens, files ready to share, etc.)
- Record:** Ask for permission and be aware of industry security laws

Meeting Management



- Open strong** with rapport, story, and engagement; be immediately buyer-focused
- Mechanics of open:** Review agenda, note tech options (e.g., virtual white board), review timing, ask what buyers want out of the meeting
- Collaborate:** Involve the buyer; use virtual white boards and ask questions to generate discussion and get buy-in
- Check in:** Ask periodically if people are getting what they expect
- Mechanics of close:** Know when you will wrap, check in with enough time before the wrap to ask perception questions (e.g., Did you get what you hoped for? Did we miss anything?)
- Close with a next step:** Book the next meeting on the call
- Follow up with written summary**

Building Rapport



- ❑ **Remember the [4 Principles of Rapport](#):** Empathy, Authenticity, Similarity, shared Experience (EASE)
- ❑ **Create time/space for rapport;** be deliberate
- ❑ **Kick off with, "How are you?":** Lead with empathy and listen
- ❑ **Ask specific rapport questions:** Proactively ask non-work questions to humanize discussion
- ❑ **Don't be mechanical:** Laugh and have fun; remain professionally balanced
- ❑ **Keep video on:** Seeing you builds rapport/trust
- ❑ **Demonstrate capability, integrity, and dependability**
- ❑ **Build rapport with email:** Add personality to your emails; rapport is not just for meetings
- ❑ **Offer standalone catchups** in between business-purpose meetings

Demos



- ❑ **Prepare:** Tailor the demo
- ❑ **Stick to six-minute segments** to pause and check in
- ❑ **Check in:** Ask, "How is it going for you? Too much detail? Too little? Pace okay? Are you learning what you want? What am I missing?"
- ❑ **Use multi-media:** Show a video, show your product live with webcam, use graphics online; go beyond click-and-show slide presentation
- ❑ **Watch the buyer's body language:** Keep your eyes on the video; if you sense disengagement or anything but rapt attention, check in

Uncovering Aspirations/Afflictions



- ❑ **Be organized:** There's less tolerance for aimlessness in conversation
- ❑ **Prepare custom questions** to demonstrate your research and uncover specific needs
- ❑ **Ask questions beforehand** via email to engage and tailor meeting to be most valuable
- ❑ **Be inquisitive:** Heightened presence and focus are critically important
- ❑ **Keep questions in view** where only you see them
- ❑ **Use on-screen visuals** to spur needs sharing

Making the Impact Case



- ❑ **Know the impact model:** Prepare questions to gather data to make your impact case
- ❑ **Build the impact case live:** Use virtual white boards or take impact case notes; plug into impact modeler to show ROI; screen share
- ❑ **Engage with perception questions:** Ask, "Is this worthwhile? Could this happen? Is this right? What are we missing?"
- ❑ **Make the emotional case:** What's at stake? What will the buyer gain or lose?
- ❑ **Address how you'll minimize risk**

Driving Insight



- ❑ **Research:** Ask questions of others, research the firm, run [Win Labs](#) before meetings to figure out what ideas might have the greatest impact
- ❑ **Share videos, case studies, overviews, white papers, etc.** with your ideas in advance
- ❑ **Tell [Convincing Stories](#)** to educate and inspire; stories are incredibly connecting
- ❑ **Inspire with new ideas early**
- ❑ **Provide an 'aha moment'** that's new (to the buyer), noteworthy, or non-intuitive
- ❑ **Provide detailed summaries** and follow up with more information to support new ideas

New Reality and Proposal Presentations



- ❑ **Orchestrate:** Engage from start to finish; create complete experience to be value-adding and impressive to buyers
- ❑ **Follow the [Convincing Story](#) framework**
- ❑ **Learn about attendees:** Who will be there, what they're like, how they consume information; tailor the meeting plan to match
- ❑ **Run tech checks** for important meetings (e.g., finalist presentations)
- ❑ **Address the [4 Whys](#):** Why Act? Why Now? Why Us? Why Trust?
- ❑ **Paint a picture of the [New Reality](#)**
- ❑ **Make your ROI case graphically**

Video



- Use video** for every meeting
- Use an HD webcam** and test prior to meeting
- Adjust head position:** Top of head should be 10% to 15% from the top of screen
- Look into the camera**
- Position camera** to eye level or slightly above
- Stay in the visual**

Lighting



- Manage face lighting** so it's even with medium to light brightness and no dark shadows
- Reduce backlighting** and overheads that create dark faces and glare
- Use purpose-built video lights** such as ring lights or desk lights and dimmers
- Use color temperature adjustments** for hue control; stay more white/blue than orange
- Green screen:** If room lighting is hard to control, use face lights and green screen with digital background photo

You



- Manage color contrast in clothing choices:** Avoid green with green screens; avoid black tops with dark backgrounds
- Think "important live meeting":** Dress as if you were live; if unsure, dress up one level
- Avoid busy patterns**
- Remain 1.5 to 2 feet from the camera**
- Stay present:** Keep eyes on the camera, don't check phone, email, second screen, etc.
- Keep good posture**
- Use facial expressions:** Don't overdo facial expressions (gets distracting) and don't not move at all (seemingly disengaged); most sellers are too understated and should project more

Audio



- Get a high-quality external mic** or headset
- Dial in** when bandwidth or audio quality are poor
- Test sound** prior to meetings
- Turn off notifications**
- Minimize home noises** such as barking, voices, lawnmowers, etc.
- Mute typing noise**
- Be aware of mute:** Take yourself off mute before needing a reminder

Background



- Two core options:**
 1. Prepared actual setting
 2. Green screen with digital background
- Review background for professionalism:** Declutter and clean area
- Be authentic:** Real office settings are best; set look and scene to project desired brand
- Limit background motion**
- Use green screen** for digital background quality

Motivation



- ❑ **Use Extreme Productivity Morning Routine:** [Start here](#) to get your day off on the right track
- ❑ **Plan actions weekly** and review daily
- ❑ **Track progress with accountability partner:** Stay motivated by 'owing' your work to someone else
- ❑ **Say "3, 2, 1, Go!"** to get started on difficult tasks
- ❑ **Use positive self-talk** to boost your motivation, emotional status, and productivity
- ❑ **Change your habits:** Identify habits that hinder productivity and [change them](#)

Execution



- ❑ **TIME Sprint:** Execute in the Zone and be hyper-productive by putting on a stopwatch and not doing anything else for at least 20 minutes
- ❑ **Sprint through distraction:** Write down distractions that pop up in your head then stay on task; don't task switch
- ❑ **Move your phone** and close messaging apps
- ❑ **Relay:** Extend hyper-productive time by doing four successive sprints
- ❑ **Say, "3, 2, 1, Stop!"** to discontinue any activity taking you away from executing a more important one

Training



- ❑ **Be proactive with your coach:** Enlist your manager or another person to help you improve
- ❑ **Record your calls:** With permission, record then have calls analyzed for improvement
- ❑ **Take control of your learning:** Find time and [programs](#) to improve your skills and knowledge

Focus



- ❑ **Obsess Over TIME:** Take Treasured, increase Investment, minimize Mandatory, eliminate Empty
- ❑ **Calendar your investment TIME**
- ❑ **Tackle your Greatest Impact Activity** first thing
- ❑ **Do less:** Think, "If it's not gung ho, it's no"; make sure only important activities stay on your to-do list
- ❑ **Turn off alerts:** They distract buyers during sales meetings and distract you when they're on
- ❑ **Signal "Do Not Disturb":** Make sure others know not to interrupt when you're concentrating; wear noise-canceling headphones

Workspace



- ❑ **Declutter:** Clutter can increase distractibility
- ❑ **Use two or three screens** when you work
- ❑ **Work in a quiet** and private space
- ❑ **Shut the door** to aid concentration and minimize distractions

Energy and Self-Care



- ❑ **Practice mindfulness** for mental health
- ❑ **Stay social:** Make time to connect with family and friends or attend a virtual meet-up
- ❑ **Take Treasured TIME** for yourself doing things you love to fill your tank
- ❑ **Be active:** Maintain energy to execute by walking, exercising, or doing anything that keeps you moving

Virtual Selling Checklist: PRODUCTIVITY



When selling virtually, it's important to keep yourself focused and productive. This is a condensed list of hacks from [9 Habits of Extreme Productivity](#) and the book *Not Today: The Productivity Code Revealed*.

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