

# Sales Process Highlights

## **AS IS, ETC.**

Adapted from Dale Carnegie

- 50% “As Is” questions
- 30% “Should Be” questions
- 13% “Payout” questions
- 7% “Barriers” questions

AS IS questions help you to determine the buyer’s current situation.

- What does your current investment strategy look like?
- Would you describe your current portfolio?
- What don’t you like about it?
- How do you make your investment decisions?
- What do your investment dollars need to accomplish?
- Will you tell me a little bit about your company?
- What challenges are you/your company facing?

SHOULD BE questions help determine the buyer’s vision. They focus the buyer on how the situation can be different and get them to see the gap between what they have and what they could have.

- What should the ideal portfolio look like in 6 to 9 months?
- Why is that important?
- What are you trying to create?
- What is the ideal outcome you’d like to see?

**Keep asking questions until you know exactly what they want.** Ask questions that will bring out other considerations.

- What other things would be nice?
- Are there some added benefits that you haven't mentioned?

Sometimes people settle too easily for the status quo and need to be prodded, need to dream bigger, need to believe that there is more to be had.

**BARRIERS** questions identify the factors preventing the buyer from achieving the "should be." Let them know that there is a cost to doing nothing.

- What are the barriers that have prohibited you from reaching your future goals?
- How has that held you back?
- What is in the way?
- How much is that costing you?
- Are you awaiting the results of other initiatives or decisions?
- Do you have to seek anyone else's approval?
- What's stopping us from working together?
- Would you like to get started now?

**PAYOUT** questions identify why they want the "should be" and how important is it to them. What do they want and why do they want it?

- So what will accomplishing this bring you personally?
- How will your life/job improve?
- How important is this compared to your overall responsibilities?
- What does accomplishing this goal mean to your family?
- What does it mean to your future?
- On a scale of 1 to 10, how important is this goal to you and your family? (You want them to be close to a 10.)

End by presenting a solution that will make their picture become a reality. Use only benefits that are on target. Don't expand or recite anything else.

- Use their name: "Craig, based on what you've told me I believe this is very attainable. May I share with you how I've helped clients in similar situations?"
- You want them to think: "If it's working for someone else, maybe it'll work for me."
- There should be no question as to **IF** they are going to use you. Rather, their question should be, "How do I use you?"

## **Your Success is My Business**

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