

VECTOR FIRM

Sales Academy

Difficult Conversation Checklist

Before leading a difficult conversation with a customer, run through this checklist. Use this document as a tool to create the right messaging and as a reminder of who you want to be and the relationship you want to foster. This checklist has been created for tough conversations about topics in which the salesperson is not at fault but must manage.

- Remember that all salespeople are having these challenges.
- Take on the persona of being their fixer.
- Always conduct these discussions in person or on the phone.
- Include as many people as possible.
- Follow-up in writing.
- Look at this situation as an opportunity to build long-term credibility.
- Take full responsibility as the single person that will lead them through this situation.
- Communicate bad news early.
- During the selling process, let them know how you're managing these challenges.
- Set strategic expectations and reply quickly with good news.
- Above all else, show courage in communicating the hard news.