Know your objective before the call starts.

It probably shouldn’t be to make a sale.

A better strategy is to figure out if there's a fit, and whether a real opportunity exists.

To do that, you need to know a bunch of important things. What are those things?

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What do you need to know in order to know if you can effectively solve this problem? Do you understand what the problem or the opportunity is? Is it meaningful enough for them to act on? (And how about you?) Do they need what you have?

These are qualifying questions, and they're the foundation of professional selling. Salespeople who consistently close deals aren't the ones who pitch hardest. They're the ones who can efficiently determine which deals are real and which ones aren't.

That clarity is invaluable... to everyone. Your manager can forecast. Your company can plan. And your prospect doesn't waste time on a solution that was never right for them.

Know what a "yes" looks like before you ask the questions.

Then do the work you need to do to figure out if there’s a fit.

Don't sell, consult.

People don't want to be sold to. They want help. If you've got real experience and expertise, use it. Guide people. That's what a good salesperson actually does.

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This one is hard to teach, because it requires you to let go of something: the idea that you're there to sell someone something. That takes confidence. It takes a kind of relaxed, almost Zen mindset, where your only real goal is to figure out whether there's a genuine fit. No agenda. No pressure. Just curiosity.

Here's what happens when you get there: you start to advise. You diagnose. You make recommendations, sometimes ones that have nothing to do with your solution. And the customer notices. The conversation becomes productive. It starts advancing their goals, not just yours. That's when they stop seeing you as a vendor and start seeing you as someone worth listening to.

The ego move is pitching. The professional move is helping. Salespeople who consult close more, because people don't resist help, they welcome it.

Pick up the phone.

A quick call beats an email. More context, more nuance, more relationship. Most people are afraid to call. If you're not, you're already ahead.

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A phone call, and ideally a video call, gives you things the written word can't. You can hear hesitation. You can catch confusion before it becomes a wrong turn. You can laugh at something together, change direction mid-sentence, and actually build a relationship. Email is a monologue. A call is a conversation. And trust is built in conversations, not inboxes.

Early in my career, a customer accused me of something, by email. I could have fired back. Defended myself. Let it become a back-and-forth that poisoned the relationship. Instead, I picked up the phone. I expressed my frustration directly. He expressed his. We worked through it, in real time, in a single conversation. After that call, something shifted. He started treating me as a peer. As a consultant. The relationship was better than it had ever been. That doesn't happen over email.

The Minimum Viable Answer

Product people have this thing they refer to: Minimum Viable Product, or MVP. It’s the very early version of the solution rolled out to early-adopters to prove the idea works, solves a customer problem, and signals value.

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Let’s apply that to your customer conversations.

When a customer asks you a question, can you respond with a Minimum Viable Answer? Rather than rambling on with a 3 minute explanation, can you provide a succinct but complete answer possible.?

Say that a customer asks “Is your system able to run detailed monthly reports?” Can you respond with “Absolutely.” OR “Absolutely. Are there any particular details you’re looking for?”

Less is more.

By taking an MVA approach, you spare your customer from enduring a list of product noise they may have no interest in. Instead, you're 1) definitively making clear that you have detailed monthly reporting, 2) you're being respectful of their time and attention, and 3) you're inviting them to explain their priorities or concerns and that you're prepared to listen as they do.

As with any technique, an MVA approach to sales engagement and discovery has its limits. There are definitely instances where detailed product/service explanations are warranted, and where a terse, simplistic answer may be off-putting.

But it’s less frequent than you might think. Because most people would rather talk than listen (including many salespeople), and so an MVA approach works to disarm and engage your prospect. And every salesperson knows an engaged, participative customer translates into a better opportunity to craft a compelling proposal and an effective solution.

In short, Minimally Viable Answers can result in Maximally Successful Customers.

Ditch the slides.

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Or more precisely, don't rely on slides to do your presenting.

Why?

Because slides kill imagination. And they slow things down. And they constrain the conversation.

The moment you show a screenshot or a page full of text, you've created boundaries and boxed in how they think the problem and the solution.

In early-stage conversations especially, let them imagine possibilities. Save the slides for genuinely complex workflows or architecture where a picture is worth a thousand words.

If you can run the entire meeting without slides, you're a pro.