

Closing Effectively

READINESS

Closing a meeting or deal often gets fumbled due to several common missteps. See how many of the following questions you can check off with a “Yes.”

Have you:

- Defined the close or the commitment(s) you will be seeking at this meeting?
- Shared and validated the close with your team?
- Decided who will close?
- Overcome self-limiting obstacles, such as:
 - Concerns about coming across as pushy, confrontational, or icky (sure, that’s a word)?
 - Believing that clients close themselves?
 - Using a presumptive close?
 - Rushing to close based more on self-confidence than on client-based facts and feedback?
- A full appreciation for the importance of closing well — for you, your organization, and (often forgotten) for the client?

BEST PRACTICES

If we can agree that business relationships are advanced when every client or prospect interaction is ended professionally and completely, here are some reminders on best practices that lay the groundwork for an effective close that you, your team, and your client can feel good about:

Prepare:

- Define the team’s goal for this meeting — i.e., ask for the business, a referral, or a next meeting, etc. Be specific, put timing around it, and don’t keep it to yourself. Winning teams arrive at key sales meetings fully informed *and* aligned on the mission.
- Assign lead responsibility for this part of the meeting or pitch. Once accepted, be willing as a team to role play this a few times and share feedback. Even if the person making the ask is your CEO? Especially in the case of a senior, many of whom don’t receive the honest feedback they need to accomplish the team’s mission.

Mindset:

- Clients not only expect you to close the meeting you requested, they *need* it so that your execution meets their expectations.
- Avoid the presumed close. Example: “We are ready to get started. Can we send you an agreement?”
- Client agreed that you could do some (free) work in producing documents that they may or may not choose to sign.
- This skips the close with no commitment conveyed.

Feedback:

Seeking client feedback throughout the process and conversation ensures that you stay aligned. It also ensures that the client is as confident in your team as you are in asking for an important commitment.

PROCESS: THE NEW “A-B-C”

When prompted to close, many of us immediately remember a young Alec Baldwin in David Mamet’s “Glengarry Glen Ross,” coaxing a group of weathered salesmen to “A=Always, B=Be, C=Closing.” A good close is not heroic or chest-thumping — it is a natural step in a conversation, is polished, and gains clarity on commitments and next steps. The new A-B-C of closing that is fully in line with today’s market dynamics is: A=Ask, B=Be Clear, C=Chronicle:

1) A=Ask about remaining issues, concerns, or needs.

- Asking an open-ended question, such as, “What issues are still on your mind?” can surface both new opportunities and doubts, both of which are best addressed in person.

2) B=Be clear on what commitments are being made.

- Ask a closed-ended question. Modifying one from above: “We are ready to get started. Are you ready to begin working with us?” This enables the team to leave that meeting with a better sense of clarity on what, if any, commitments were made.
- If this feels too direct, consider prefacing the ask. Example: “So that we can properly plan next steps, are you ready to hire us for this work?”

3) C=Chronicle next steps.

- Inventory the follow-up plan, including who is going to do what by when.
- A crisp and complete recap reinforces the client’s commitment to you.
- Open-ended questions here can convey client empowerment. For example, “How would you like the kickoff meeting to be structured with your team?”

In summary, approach your close methodically — with preparation, a positive mindset, and client feedback. And, follow the new A-B-C to close that next dialogue confidently and completely — and with clarity!