

Group Sales Call Flow – Quick Reference (One Pager)

 **Goal :** *Build trust, match solutions to personality, create partnerships.*

8 Steps to Success

1. **Prepare**

- Review lead details & notes
- Research planner/company

2. **Approach – Warm Start**

- Greet warmly, use their name
- Build rapport (“*Have you been to Myrtle Beach before?*”)

3. **Discover – Learn & Listen**

- Ask: purpose, priorities, rooms/space, decision-maker, timeline
- Listen for style cues (see cue box)

4. **Present – Tailor Solutions**

- Match solutions to personality & needs
- Highlight top 3 benefits

5. **Validate – Build Confidence**

- Repeat key needs
- Provide proof (reviews, stories)

6. **Negotiate – Win-Win**


- Offer creative packages
- Ask: “*If we included X, would that help?*”
- Use pros/cons list

7. **Close – Next Step**

- Propose securing rates with proposal
- Offer extras (tour, amenity)
- Confirm next step + timeline

8. **Follow Up – Loyalty**

- Same-day thank-you email & recap
- Ask preferred follow-up method
- Handwritten thank-you after event, request feedback, rebook

 **Personality Cue Box**

- **Detail** → data, timelines
- **Visionary** → big picture
- **Budget** → value focus
- **Relationship** → service, trust