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

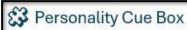
- Offer creative packages
- Ask: "If we included X, would that help?"
- Use pros/cons list

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



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