



9

minutes  
reading time

# How to Nail the Sale Using a Tablet



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# Congratulations on bringing your tablet into your sales meetings. As you have already seen, your little device can impress prospects, increase your productivity, and close sales faster.

## That is, if you know how to use it confidently. Do you?

If not, you risk losing credibility. Missing the sale. Wasting time.

Although tablets are easy to use, you may still be able to improve your performance in sales meetings.

That's why we wrote this guide. To help you close more sales, fortify customer relationships, and become even more productive.

## In the next few minutes, you'll learn:

- How to keep your prospect's attention focused on your message, not your tablet.
- Why it's more important than ever to keep all your sales collateral organized.
- Where a rigid sales presentation can lead to more failure.
- What your prospects expect to do in your sales meeting.
- And much more.



# BEFORE

## Organized and Optimized



As soon as you decide to use your tablet in sales meetings, take these steps to maximize its' performance.

### Preserve the battery

These principles apply to all tablets.

**The instructions here are for the iPad.**

1. Store your tablet in a cool place. Heat saps the battery's life.
2. Dimming the screen is a bright idea. Easier on your eyes, easier on your tablet.  
**How: Settings > Brightness & Wallpaper**
3. Minimize Wi-Fi. It hogs energy. Use airplane mode when you don't need the Internet. (Besides, you should already have all of your up-to-date sales collateral loaded on your tablet. Don't rely on Wi-Fi in your sales meetings.)

**How: Settings > Airplane Mode > On/Off**

4. Close unused apps. If you're not using an app in a sales meeting, close it. You can close unused applications by removing them from the multitasking bar.  
**How: Settings > General > Multitasking Gestures > On/Off**

### Disable notifications

Focus your prospect's attention on your sales message. Not LinkedIn updates and email notifications. If you've turned Wi-Fi off, you're already set. However, if you need Wi-Fi, disable notifications:

**How: Settings > Notifications >** Click each application in "In Notification Center" and change each app's setting from "On" to "Off."

### Avoid motion sickness

Drivers always expect the next turn. Passengers don't get that luxury. Respect your prospect with these favors:

1. Unless it's necessary for some detail, resist the temptation to pinch-zoom the screen.
2. Lock the tablet's screen so that it doesn't swivel unexpectedly.

**How: Settings > General > Tap Rotation Lock 'On.'** A small lock symbol should appear on the Tap Rotation Lock icon.



## Keep your apps organized

A few years ago, you wouldn't have entered a meeting with a briefcase billowing with sales collateral. Apply the same discipline to your tablet's home screen and apps. Keep all sales-related apps and folders on your home screen. Shove everything else onto a different screen.

**How:** Hold your finger on an app until its icon starts to shake. Then, drag one app on top of another to create a new folder containing both apps.

## Three tips to help you organize your apps



List your daily tasks. Lump the corresponding apps into one folder.



In general, how do you interact with customers? Streamline their experience before you get started.



What does your sales process look like? Have all of the relevant apps fired up by the time you meet with your prospect.

## Choose your photos wisely

Nothing helps your prospect envision your offering in her business like photos. Create a folder for all the photos that you'd normally use in your presentation.

Ruthlessly cull your photos down to the absolute essentials to convey your point. As ever, more is less. A few powerful images will focus attention and drive home your value. Also, your tidy organization will support your professionalism and trustworthiness.

## He's a prospect, not a spectator

If you want to engage your prospect on a deeper level, be ready to switch apps. You never know where he'll want to take the conversation. To encourage a healthy flow in your meeting, open all the apps that you expect you'll want.

Your prospect can approve and sign purchase orders and invoices directly on your tablet. Have the proper app open beforehand. You'll be ready to close as soon as your prospect is.

▀▀ **Branding these days is becoming less and less about talking and more and more about listening (that is, responding to customer's need in real-time, and having the proper information at your fingertips to be able to give accurate and intuitive advice.)** - Gary

Vaynerchuck



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## Practice, practice

Confidently referencing your tablet for information from previous engagements will speak volumes about your professionalism. And earn your prospect's confidence. However, he'll be equally unimpressed if you aren't confident with your tablet. Practice. Use it, instead of your laptop, whenever you can. If there were ever a good business reason to play with your tablet, here it is.

## Keep everything up to date

Nothing looks worse than an out-of-date brochure, presentation, or price list. You want to be able to bring up the latest information without hesitation. Before every meeting, ensure that you have the latest sales materials in one folder.

**“ What if wifi falters in the meeting? Keep all of the latest sales collateral saved on your tablet.**

As mentioned earlier, don't rely on the Internet, or your email to access documents during your sales meeting. What if the connection falters in the meeting? Keep all of the latest sales collateral saved on your tablet.

## Ready. Aim. Sell.

You're prepared. You're confident. You've exchanged pleasantries. It's time to get down to the meat of the meeting.



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# DURING

## Captivating and Conversational

**It's not about your solution. It's about your prospect's problem. Cultivate dialogue. Seek engagement. Be flexible. Properly used, your sales collateral can support a conversational approach.**

### Remember Powerpoint's Golden Rule

Your slides should support your conversation, not substitute for it. Reading to your prospect—for no good reason—will insult her intelligence and waste her time.

### Use the 7x7 rule

No slide should have more than seven lines. No line should have more than seven words.

Minimizing the text will keep the conversation moving, and keep the attention on you.

### Correct font size respects the eyes

Keep the font size comfortably large if you expect your prospect to read on your tablet. (Another great reason to minimize the amount of text on the screen.)

### Video: shorter is better

You wouldn't subject your prospect to a lengthy read. Keep video clips short, too. A 30-second snippet with just a few succinct points will have greater impact than a two-minute video crammed with every benefit your product touts.

#### **Stun them!**

For more ideas on using video and graphics to tell your story check out Stun - [www.stun.co.nz](http://www.stun.co.nz).



## Give him the tablet

One of the major advantages the tablet has over a laptop: it eliminates the traditional barrier created by the laptop's screen. You're freer to engage your prospect in a personable conversation. Take it another step: put the tablet in his hands. You'll leverage the novelty of the technology and help your prospect to imagine using your offering.

## Be clear

Everyone suffers from information overload. Distinguish yourself with clarity and candor. The more you help your prospect sift through her options, the bigger a favor you'll be paying her. Focus on the challenges she's struggling with today.

## Put the tablet down

Remember that the tablet is there to support your conversation, not substitute for it. When it seems appropriate, put your tablet down. Devote your full attention to your prospect and his problems. Technology can't substitute for face-to-face rapport.

**“ Remember that the tablet is there to support your conversation, not substitute for it.**



# AFTER

## Momentum and Memory

**Your tablet sets a high level of expectation. Once your sales meeting has ended, impress your prospect (or new customer?) with a prompt follow up.**

### CRM ASAP

As soon as possible, enter your notes into your Customer Relationship Management (CRM) system. The sooner the details are off your mind, the sooner you can focus on your next steps.

**Note:** Some sales apps allow headquarters to aggregate and analyze sales data. Over a longer timeframe, that could identify the most effective sales reps and presentation styles, improving the overall performance of the sales force.

### Milk every moment

Thanks to your tablet's connectivity, you can use travel time to complete your end-of-day tasks early. Between sales meetings, make follow-up calls, enter data remotely, and complete customer orders.

“ **Some apps will even allow you to queue and send sharing-links automatically as soon as wifi is re-established.**

Thank you for your time and attention. If you think of another tip that would complement this guide, please share it with us.

### Share generously

As you're leaving, your prospect may ask for a brochure or video that appeared during your talk. A golden opportunity. Share a link to this material, not an attachment.

Why not share an attachment? Analytics. If you use an app that tracks these links, you'll collect priceless information:

- The number of times the link is opened.
- Whether the link has been forwarded.

Essential measurements of your prospect's genuine interest. What's more, the shared material –and its associated analytics– provides the ideal excuse and context for your follow-up call.



# Showcase Workshop

**Everything a sales professional needs.  
All in one place. Never out of date.**

Showcase is a complete collateral management system and sales toolkit for your organisation.

It works across all tablet devices, such as iPad, Samsung Galaxy, Microsoft Surface; Apple and Android smartphones; and it works on your laptop or desktop too, via a Chrome App or through any web browser.

Showcase Workshop allows sales and marketing managers to distribute and control their existing collateral with their own brandable app. Sales collateral can be presented to customers according to their interests, instantly shared for their review, and tracked for analysis.

## Leading brands use Showcase to:

- Control content on their mobile devices
- Eliminate print and distribution costs
- Coordinate an international sales force

Companies that sell everything from energy to elevators, from SUVs to IT solutions rely

on Showcase for its intuitive setup and user interface, and its compatibility with the most common file formats. With Showcase, salespeople in the field have the product information they need to save time, sell more, and boost revenue.

**Showcase. Selling never looked this good.**



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