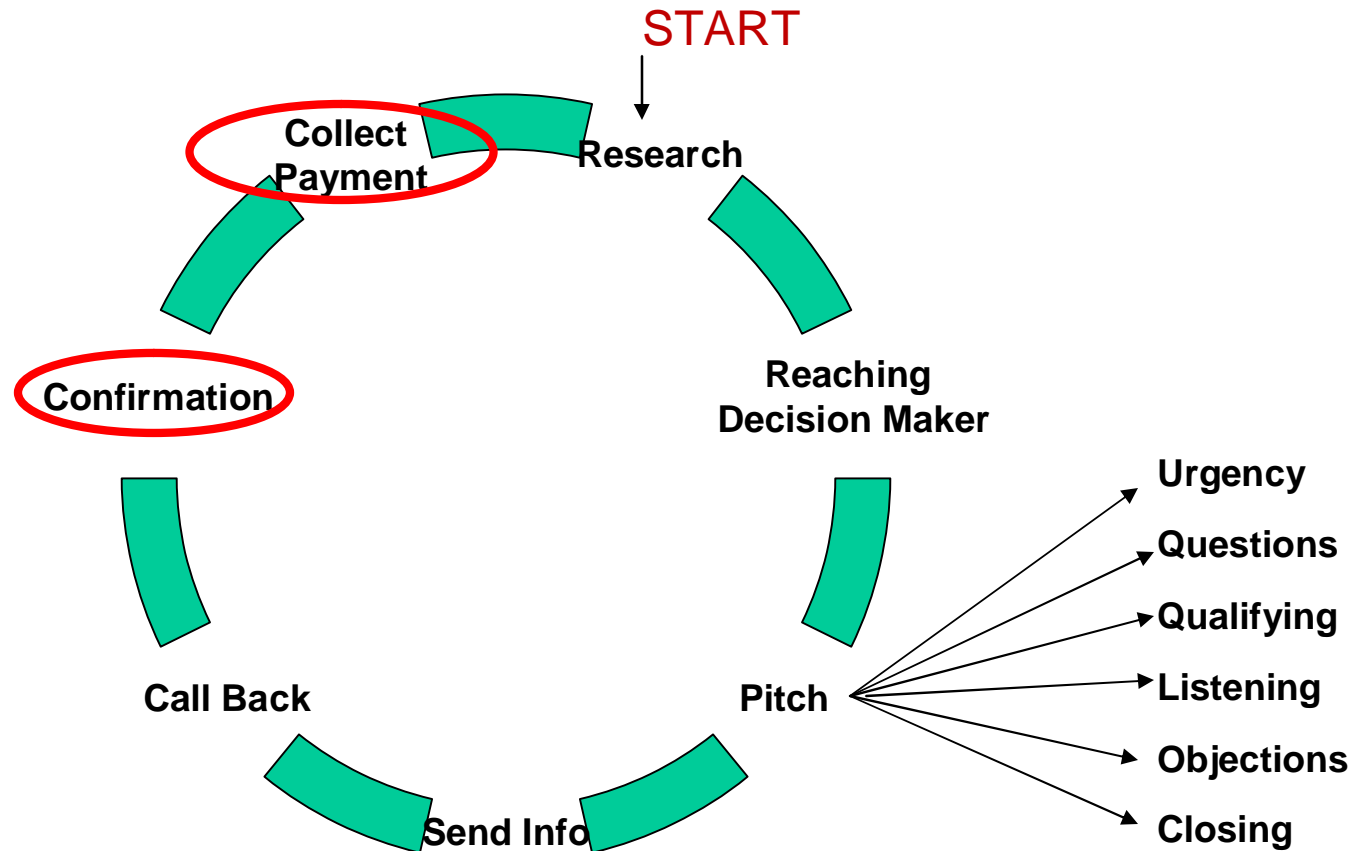


# **Confirmation & Payment**

# Overview of the Sales Process



# Confirmation

## ✓ When

Confirmation is done after you have received the registration form.

## ✓ Why?

You want to make sure that the other side knows we have received the registration and confirmed the seat(s).

## ✓ Two Steps to a proper confirmation

1. Contact the Delegate & thank them for registering
2. Contact the person doing the paperwork, thank them and clarify payment

# Confirmation

## 1. Contacting the Delegate

Hi ... This is ... I just received your registration form for ...  
event name, dates, venue ...

I would like to thank you for giving us the opportunity of  
doing business together and welcome you on board for  
this program.

You will receive an email from our operations department  
regarding all the details of the event. However I am  
still here and for anything you can refer to me.

Regarding the invoicing payment etc, who should I liaise  
with from your organisation?

**What you say next will double your  
Sales, so pay close attention.**

# Confirmation

## 1. Contacting the Delegate

*- Last thing you must do is ask for REFERRALS*

Finally, since you found this event useful & beneficial to attend, could you please let me know who may be 1 or 2 other people that I can contact regarding the same? They may be from your company/organisation, or maybe they are people that you've worked with previously, people you met in another seminar or conference in the past, or people with whom you are part of the same professional association and so on. Who probably comes to your mind at the moment.  
(SHUT UP)

*Once you got the names, close the call and say:*

Thanks again for registering for this program. If there's anything you need help I'm here. Bye.



# Confirmation

## 2. Contacting the Paperwork Runner

### Remember:

This person is important, as many times it will depend on him/her whether you receive the payment now or ages later.

Most probably this is a person you already have been in touch with before getting the deal.

### ***What do you say at the start?***

Hi ... This is ... Thank you for sending in the registration form for ... Delegate name ... event name, dates, venue ...

Everything is confirmed on our side. What I am going to do next is to issue an invoice & confirmation email regarding this. Who do I send this to?

***Then follow the points in the next slide***

# Confirmation

## 2. Contacting the Paperwork Runner

- ✓ Find out/Reconfirm:

1. Whom to attention the invoice,
2. Participants Names
3. Programs they are attending
4. Price for the registration
5. Correct mailing address.

- ✓ Then for all the names, find out/reconfirm

1. correct spelling of full name,
2. correct position,
3. telephone number, fax number, e-mail addresses

# Confirmation

## 2. Contacting the Paperwork Runner

- ✓ Clarify the process of payment in Client's company and explain the 7 working days policy. If the client cannot pay within 7 working days then see to meet somewhere in between.
- ✓ Explain about e-invoice procedure in our company and find out if that is acceptable to them. Insist on e-invoice, because if they want a hard copy they can print it. Explain that there is no difference if you print out or they print it out. Only as a last resort arrange for invoice to be sent.
- ✓ After all has been clarified thank again and
  - agree on a call back – purpose of the call back
  - to ensure that the invoice & confirmation has been received.
- ✓ Forward the registration form after completing the above needed information to Finance/Operations Person/Department, so that we can issue the invoice & also email the confirmation



# Payment

## Step #1:

Ensure that the invoice & confirmation have already been sent out from us to the client.

## Step #2:

Call the contact person the next working day to ensure that the invoice has been received and where is it right now.

How soon is the payment going to be ready?

Can they do payment by TT/Giro straight to our bank account, or are they paying by cheque?

If cheque, can they deposit into our bank account directly & send a copy of submission so that we can trace the payment?

If cannot deposit, can they courier the cheque to us?

Finally if none of the above, when can we arrange for a courier pick up.

**Always agree on a call back day/time or communication by email**



# Payment

## Tips to Ensure Timely & Voluntary Fast Payments

- ✓ Understand that you have closed a deal only after you get the payment. Anytime before you get that, there's a risk of cancellation. Fast payments ensure that there are no cancellations.
- ✓ Follow Up & Follow Up but do not overdo it.
- ✓ Agree upfront on the follow up time & purpose.
- ✓ Use email to follow up rather than the phone only.
- ✓ Always treat well the person processing the payment for you.
- ✓ Always appear to be helping them. Offer how you can help.
- ✓ Whenever you're stuck get a second person to help you. He/She will be the operations/finance person who is following up on this overdue payment.