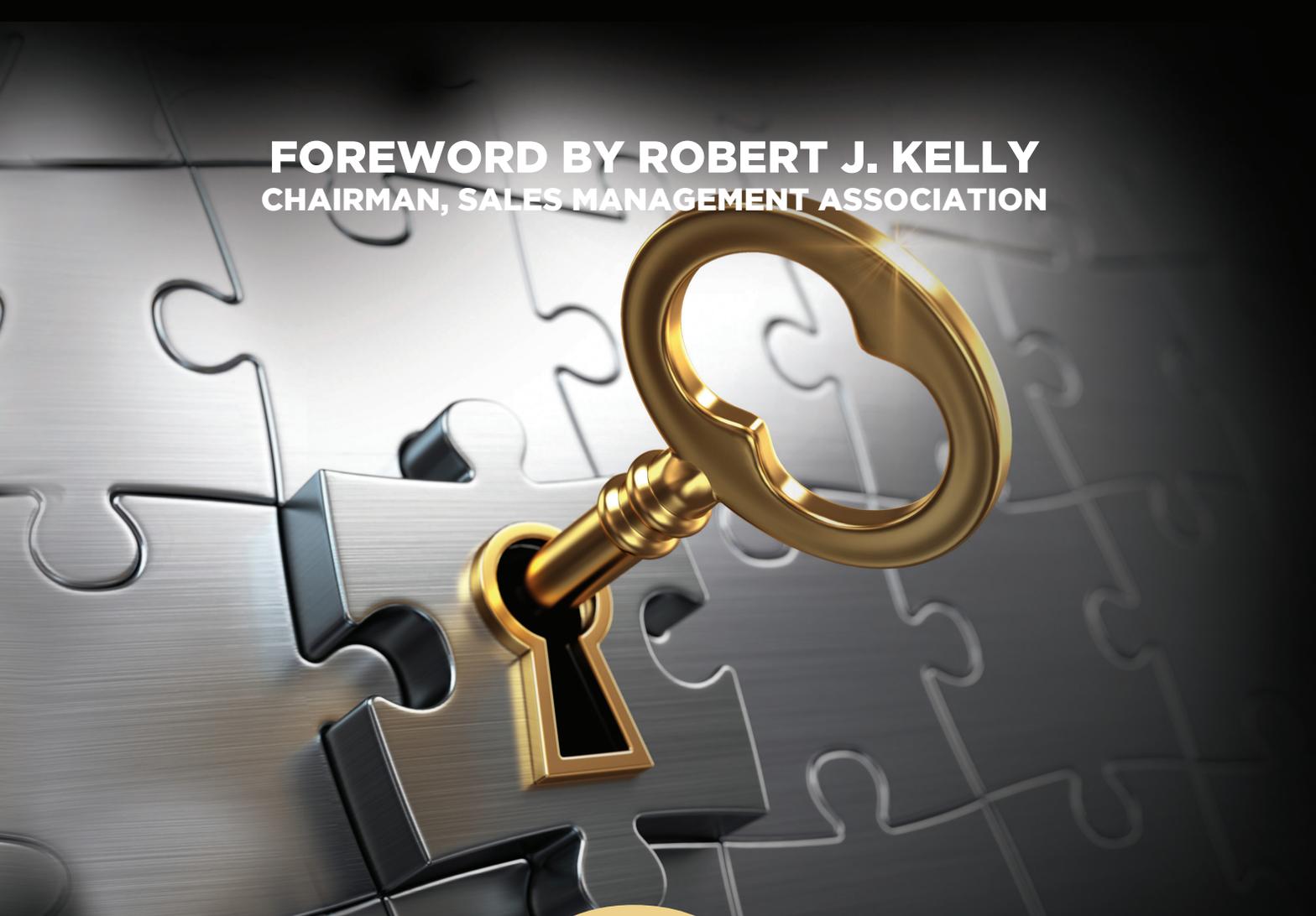


FOREWORD BY ROBERT J. KELLY
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B2B

PROFESSIONAL

SALES

Chapter 6 Sales Activities

JP AMLIN

Sales Activities



The Steps to Success

The sales activities are used throughout the opportunity management process and in the broader responsibilities of successful pipeline, account, and territory management. The definition of each management process is shown in the sidebar “I’m not Management, I’m Sales”. There are five main sales activities as shown in **Fig. 6.1** with the core skill of relationship management being a part of each sales activity.

In this chapter each of the main sales activities will be discussed in detail and pipeline management will be briefly introduced. Later in the textbook there will be a dedicated chapter discussing pipeline, account, and territory management.

Relationship Management

Many things go into winning a sale—the fit of your solution, your value proposition, pricing, track record, responsiveness, and so on. Although all these factors impact your customers’ decisions to buy, Aberdeen, an independent research firm, in its September 2009 study with 500 best-in-class companies, identified the relationship between the customer and salesperson as the #1 reason why a customer buys from a salesperson. It boils down to how the customer feels about (i.e., trusts and relates to) the salesperson or sales team. Successful salespeople have known this for a long time, and hard data affirms it.¹

In another study published in the *Journal of Marketing*, the authors concluded that salespeople involved in the marketing of complex services often perform the role of “relationship manager.” It is, in part, the quality of the relationship between the salesperson and the customer that determines the probability of contin-

Chapter Objectives

After reading this chapter, you will be able to:

- Understand the key sales activities to manage a sales pipeline.
- Make relationship-building a specific and continuous process.
- Choose which components of prospecting to include in your prospecting plan.
- Apply a structured approach for building proposals.
- Know how to manage key follow-up activities.

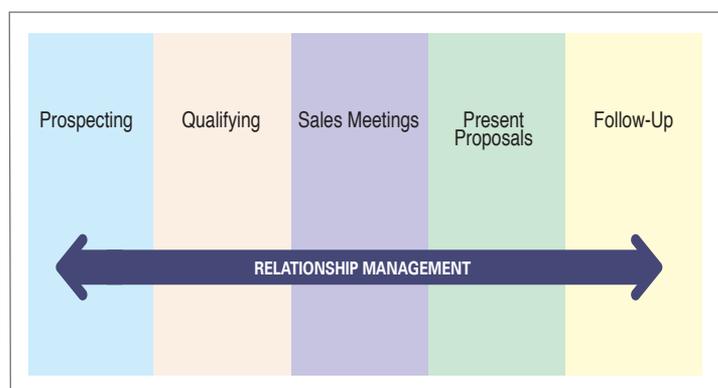


Fig. 6.1 Sales activities critical to a salesperson’s success.

► **“I’m Not Management, I’m Sales”**



You may not be in management, but sales staff are expected to effectively manage their assigned area of responsibility, which most commonly in B2B sales is either a territory or one or more accounts. To determine the value of your business, you need to have an opportunity pipeline.

Specific definitions for each are:

Opportunity Management

Strategically managing a single opportunity in a competitive marketplace.

Pipeline Management

A pipeline is a database consisting of all identified opportunities for the area of responsibility of the salesperson. Each opportunity falls in one of the ten stages of the opportunity management process. To maximize revenue from a pipeline, the salesperson must prioritize sales activities based on opportunity stage, revenue, competitive threats, and strategic importance of the opportunity.

Account Management

Develop strong relationships with all of a client’s executives and decision-makers; understand the account’s business drivers and how the account prefers to do business with its suppliers. The goal of account management is to maximize the long-term value for both the supplier and the account. For large key or strategic accounts, there can be a dedicated Account Manager who is a resource for salespeople selling to the account.

(cont. on opposite page)

ued interchange between those parties in the future. The findings suggest that future sales opportunities depend mostly on relationship quality (i.e., trust and satisfaction), whereas the ability to convert those opportunities into sales hinges more on conventional source characteristics of similarity and expertise. Relational selling behaviors such as cooperative intentions, mutual disclosure, and intensive follow-up contact generally produce a strong buyer–seller bond.²

In the context of a salesperson, there are very specific skills and activities that lead to stronger customer relationships, as follows:

- Communication skills
- Customer profiling
- Trust building
- Application of the sales activities in a professional productive manner for both the customer and salesperson

Building Strong Relationships

It is very important for the salesperson to recognize the value of building relationships and getting to know and understand their customers. The success and satisfaction that result from having ongoing business relationships with satisfied customers are what professional salespeople strive to achieve. Up to this point in the textbook, you have already read about the communication skills you will use in the sales activities and two very important customer profiling factors: technology adoption and social style. These factors provide insights into how to better align with the customer to assist them in making a business decision.

However, what does building relationships mean? One of the best references for building relationships is the book entitled *The Trusted Advisor*³ in which the authors are experts in the professional services and consulting industry. The authors share their real-life experiences coming from their fifty years of professional services and consulting industry experience. The basic premise of their book is to build stronger relationships with your clients. What you are trying to do is have them trust you more. Trust or stronger relationships can be measured by the level of the customer’s perception of four key elements that make up the trust equation:

- Salesperson’s credibility
- Salesperson’s reliability
- Level of intimacy
- Salesperson’s self-orientation

For more description of the trust equation, see **Chapter Highlight 6.1 “Tipping the Scales.”** The major take away from the trust equation for salespeople is that you can develop relationships by strengthening the elements making up the trust equation. For salespeople, the rewards of stronger relationships with your customers are many. A few of the more significant benefits are as follows:

- Earlier notification of customer projects, giving the salesperson more time to prepare a winning proposal
- Willingness from the customer to act as a reference or provide leads to help the salesperson gain access to decision makers of future business
- More productive and efficient negotiations that are conducted in a collaborative spirit, resulting in the best deal for both sides
- Honest feedback regarding proposals and levels of service and satisfaction with the salesperson’s organization and performance

Territory Management

The salesperson's responsibility is to be assigned a territory. Within the assigned territory, the salesperson must prioritize how they spend their time with the goal of maximizing revenue from the territory. The most common territory assignments are as follows:

- **By Country, Region, City, or Zip Code**
- **By Vertical Market:** Examples of vertical markets include manufacturing, health care, and energy. Large vertical markets such as energy may be divided into sub-markets, such as conventional and unconventional
- **By Named Account:** Several accounts are assigned by company name. Large accounts may be further subdivided by geography, division, business unit, etc.



Each of these benefits are significant for a salesperson working in a competitive marketplace. Receiving the benefits requires the professional salesperson to invest time and resources into building stronger relationships with their customers. The salesperson should ask themselves in which situations they have to demonstrate credibility and reliability to get to know the customer better (intimacy) and show the customer they care about their success.

Some of the opportunities for professional salespeople to positively impact each of the trust factors are listed below. This is not meant to be an exhaustive list, but a start to which you can add your ideas of things you can do for each factor.

Credibility

- Do your research into your target markets and accounts. Understand the customer's needs.
- Prepare: Have proof of the benefits your customer will receive if they use your company's product and services.
- Understand your products and services. Know what your strengths and weaknesses are for the major issues and successes.
- Take time to become familiar with the competitors' products and services.
- Share industry reports of interest and share insights.
- If you cannot answer a question, tell the customer you do not know, but will try to find out and get back to them.

Reliability

- Be early for appointments.
- Use appointment requests to formalize and have meetings posted on personal calendars.
- Check with operations or manufacturing to ensure availability and deliverability of products and services before making commitments to the customer.
- Keep the customer up to date on progress and changes. Be the first to call before they call you.
- Always check timing at the start of meetings and stay on schedule.
- Be predictable in a professional sense. Use checklists, forms, and procedures to ensure that important information is discovered and critical factors are always considered.

Chapter Highlight 6.1: Tipping the Scales

The Trust Equation

We hear a lot of conversations these days about building relationships, but just exactly what does that mean? For most of us, a better relationship means a relationship where the level of trust between the individuals is increasing. So how do you increase the level of trust? According to the authors of *The Trusted Advisor*, trustworthiness revolves around words, actions, emotions, and motives.

The relationship between these factors and how each affects your ability to build trust is described by the Trust Equation, as shown below:

$$T = \frac{C + R + I}{S}$$

Where:

T = Trustworthiness.

C = Credibility. This factor revolves around words and is high when the other person believes they can believe what you say.

R = Reliability. This is more action oriented and increases when the other persons believes you will do what you committed to.

I = Intimacy. Intimacy is about emotion and increases when the other person feels comfortable around you.

S = Self-Orientation. This factor is about motives and decreases when the other person believes that you care about their success as well as your own.

To estimate trustworthiness, the authors assigned values to each factor on a 10-point scale, with 1 being low and 10 being the best for the C, R, and I factors. For the S factor, a rating of 1 indicates very low self-orientation, meaning you care much more about the customer than yourself, and a rating of 10 indicates that you do not care about the customer, but only yourself. Based on this measurement, the authors then estimate a typical level of trustworthiness for a new client and a successful existing client relationship as:

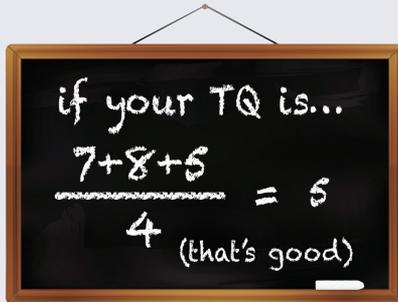
$$\text{New client: } T = (C+R+I)/S = (5+3+2)/8 = 10/8 = 1.25$$

$$\text{Existing client: } T = (C+R+I)/S = (7+8+5)/4 = 20/4 = 5$$

- **Trustworthiness.**
- **Credibility** revolves around words and is high when the other person believes they can believe what you say.
- **Reliability** is more action oriented and increases when the other person believes you will do what you committed to.
- **Intimacy** is more about emotion and increases when the other person feels comfortable around you.
- **Self-Orientation** is about motives and decreases when the other person trusts that you care about their success as well as your own.



Chapter Highlight 6.1: Tipping the Scales (cont.)



For salespeople, this is very helpful as the equation gives you specific factors to focus on to build relationships with your customers. What is evident from how the equation is calculated is that self-orientation is the most critical factor.

Not all relationships are going to develop without some issues. What the trust equation suggests is if you have a problem with the factors in the numerator (top part of the equation) you can recover the relationship but having a problem with the self-orientation is much more serious. It will be very difficult to recover the relationship, and it will take much longer than recovering from problems with the factors in

the numerator. For example, if you recommend something to your customer and it does not work, you can apologize. State you were convinced this should have worked and your reasons why, and commit to investigating why the problem happened and try to find a remedy. In this scenario, your credibility has decreased, but with proper handling of the problem you will recover. The same can be expected for reliability and intimacy. However, if your actions demonstrate your motives are for you and not the customer, this will be very difficult to recover from. For example: To make your assigned quota for selling a new product or service, you sell this to the customer and they pay for it. However, they do not need this and they do not use it. If the customer realizes this, it will be very difficult for you to recover from this type of action. The customer will not trust you next time you try to sell them something they have not asked for. In most cases this will result in you not being considered for the next purchase or only involving your company when they send out the request for proposals.

In today's competitive marketplace, relationship is more important than ever. If in an evaluation for the award of work is close, the relationship between the supplier's salespeople and the customer's buying center members can be the deciding factor.

Tip the scales in your favor—show that you are a trusted advisor!

Level of Intimacy

- Take time to build rapport at the beginning of conversations.
- Extend invites to social events and other activities not directly connected to business.
- Ask about your customers and their family, as appropriate. First meetings in most cultures expect and allow for these types of conversations.
- Send holiday gifts, as appropriate.
- Take an interest in your customers—make note of special dates and anniversaries.
- Take customers and their spouses out for lunch or dinner or to other types of sporting or entertainment events outside of normal working hours.
- Share common hobbies or interests and charitable group activities.

Self-Orientation

- Understand the customer's needs fully before you start to sell. The opportunity management process is designed to help sell in this manner.
- At the start of sales meetings, begin with the value proposition.
- When presenting proposals, start with the customer's need or benefit.
- Check to ensure that the customer understands and whether they have any other issues or concerns.

- Prepare questions you think the customer may have of you when meeting for the first time or making recommendations.
- Always ensure that you deliver on your promises made during the pursuit phase of an opportunity in the implementation stage. Ask whether the customer used and benefited from what you sold them.

In the later sections of the textbook, you will see:

- There are steps included in the sales call skills to ensure that you keep focused on relationship building during sales meetings and presentations of proposals.
- The level of relationships will be considered when building a strategic sales plan for a specific opportunity. Special attention is given to relationship factors to answer the question “can you win?” Do you have strong enough relationships with key members in the buying center who want you to win and who will defend choosing you over your competitors?
- In account plans, there are relationship assignments. People from the supplier team are required in an ongoing business relationship for their assigned contacts and to become a resource for others who want advice or information about contacting the person for the first time.

Pipeline Management

Pipeline management (also referred to as sales funnel management) enables the salesperson to prioritize their sales activities. One of the key factors for prioritizing is opportunity sales stages. **Figure 6.2** below shows the relationship between sales activities, the sales pipeline and the opportunity sales stage. Leads, sometimes referred to as potential opportunities, are added to the pipeline as the result of successful prospecting. Once the salesperson completes the qualification process, the less attractive leads will be dropped from the funnel and the sales stage is set to closed withdrawn and the remaining opportunities are now in the sales stage as confirmed leads.

The salesperson will make additional customer contacts and decide if this is a sales opportunity their company can win. At this point in time, the confirmed lead sales stage becomes a sales opportunity for which additional sales calls will be made with the buying center members and a proposal or bid will be prepared and submitted. At the time the proposal is submitted or in the more formal tendering process when the request for proposal is received from the customer, the sales



Fig. 6.2
Shows the relationship between sales activities, sales pipeline and opportunity sales stage.

stage is changed to bid/proposal. Once the customer decides the winner, the sales stage is changed either closed won or closed lost and either you or your competitor will make revenue from the sale.

At any time after a lead is added to the pipeline, the opportunity sales stage can be changed to closed withdrawn for reasons such as the customer cancels the project or it was discovered after the lead was entered into the funnel that in fact there was no real opportunity and it is not pursued, effectively taking it out of the pipeline. The reason for tracking such types of opportunities will be discussed later in Chapter 13 “Pipeline Management.”

The follow-up sales activities vary depending on the type of award. Some awards are for the single purchase of products and the follow-up activity can be as simple as ensuring that the products are received on time and in good condition before checking for any other needs of the client and agreeing to a follow-up contact. In other types of awards, there may be an ongoing contract that can last from months to years and requires a significant portion of the salesperson’s time to follow up with the customer over the life of the contract. These types of follow-up activities were discussed in detail as part of the opportunities management process in Chapter 4.

In the next section, each of the key sales activities will be discussed in more detail, starting with prospecting.

Prospecting

Prospecting can be considered successful if it results in an opportunity being added to your sales pipeline. To add an opportunity to your pipeline, there must be a qualification decision. Qualification will be discussed in a separate section.

Unfortunately, a lot of salespeople have a negative perception of prospecting because it is often associated with a popular or unpopular prospecting technique called “cold calling.” See the sidebar “Making a Cold Call Warm.” However, a good prospecting plan includes several prospecting activities, as illustrated in **Fig. 6.3** and listed below:



- Corporate Marketing Communications Plan (MCP)
- Research
- Current Accounts
- Referrals
- References
- Networking
- Conferences
- Cold Calling
- E-mail Marketing
- Tracking

Fig. 6.3
Prospecting activities.

Corporate MCP

In Chapter 1, marketing communication plans were discussed and when done well result in a significant number of leads (request for further information or follow-up by company representative). In some companies that have industry brand recognition, the salespeople never use any other prospecting techniques. These lucky salespeople have access to more leads than they will ever have time to qualify. What makes most corporate MCPs successful is the variety of techniques

► **Making a Cold Call Warm**

Salespeople dread the thought of making a cold call to set up a meeting with someone they do not know and potentially for a company they have never worked for before—maybe in a city where they have no business that is in a country where they have no business. Help! I think I'd rather go to the dentist.

Well it does not have to be stressful. Warm up your cold calls by doing some up-front preparation, as listed below:

- Check your internal CRM system to see if the prospect is in your CRM system and whether anyone has contacted the person recently. If so, contact that person and ask for some insider information on how to deal with this person
- If there are no recent contacts but the person is in your system, then check to see who entered the person into the system and contact them
- Hold a marketing event (lunch and

learn, breakfast briefing, webinar, etc.) for the targeted company or territory and specifically invite the list of people you considered cold calls. If they attend now, you have the opportunity to meet them and thank them for attending, and now they are no longer a cold call

- Send out an email to generate awareness by addressing a challenge or issue you believe the cold contacts have. Include two levels of requesting information: a link they can go for additional information and a second link to be contacted with your email link



- Check with your suppliers to see if they know the people on your cold call list and ask if they could act as a referral
- Check with your current customer base; if someone knows the people on your cold call list, ask them to act as a referral
- Check one or several of the social media sites for insights about the person. This may lead to a common point of interest or you may discover someone who knows them and may be agreeable to introducing you or providing some insights about the person
- If you cannot find any information or anyone who knows the people on your cold call list, research their company and use your experience with similar companies as your common ground

Chances are, with a minimum amount of preparation before you pick up that phone, making a cold call could turn out to be a walk on the beach!

that are used to target the early stages of the buyer awareness stages of awareness, liking, knowledge, and preference. The techniques or components of successful corporate MCPs are as follows:

- Internet presence (web and social media) that is easy to find with high rankings on Internet searches
- Website with high quality content, white papers, success stories, and other publications available to the general public, with easy request for information or contact facilities as well as visitor statistics to help manage and improve the website
- Subscription services for regular updates via e-mail or regular mail
- Participation in industry conferences and events (speakers, booths and sponsorships of events)
- Advertising
- Public relations such as participation in national and local charities, corporate-sponsored charities, or donations of either money or employees' time
- Industry-sponsored training sessions can be either for a fee or by invitation

In some companies, it is that salesforce who must source some or all of their own leads if they are to achieve their sales targets. However, in this situation they should be aware of what the corporate MCP consists of (content, schedules, other support resources, etc.) so they can leverage when possible the corporate MCP assets in their prospecting plan.

Research – Account Specific

Prospecting is more successful when it is focused on specific requirements of a target market segment that your product and services can provide. For account-

specific research, the main tool is the Account Profile described in Chapter 3. From the account research, the salesperson then develops an account plan identifying a pipeline of opportunities for which a sales plan is created. The specifics of what an account plan consists of will be covered in Chapter 13 “Pipeline Management.”

Research – Territory Specific

To support your selling efforts in a territory, you need to identify the following:

- Territory size in terms of market expenditures and number of customers
- Type of customers (profit/non-profit, government, international, national, large, medium, small, very small)
- Segmentation of market by customer needs or industry
- Number of competitors, market share, value proposition, call patterns
- Customer buying behavior (formal/informal, buying frequency, process). A best practice when entering new territories is to hold interviews with target customers to learn about their needs prior to committing resources to the territory. A good source for this type of information is customer procurement departments or financial managers
- Existing territory pipeline
- Significant industry events or conferences
- Professional organizations and local chapters

From the territory research, the territory salesperson, revenue objectives, or quotas are allocated. Quotas are then used to set call patterns, which includes the allocation of the salesperson’s time with target customers or segments. The biggest challenge is to ensure that the salesperson’s time is optimally allocated across a large group of multiple customers.⁴ Important outcomes from the territory research include any additional demand generation efforts, such as resources or support needed beyond the corporate MCP, and the amount and type of prospecting the salesperson will commit to as part of the territory plan.

Current Accounts

Too often, salespeople do not allocate a portion of their prospecting time to their current accounts, which are accounts they are currently selling to. This happens when the salesperson becomes confident that the account will continue to buy from them or has a fear of changing anything when they are being successful. Prospecting in current accounts must be done tactfully and is most effective when the salesperson goes:

- Deeper into departments for which they are selling to, getting to know more people who are in the department. Rather than depending on a single point of contact, for example, in procurement, also make contact with operations and finance, etc.
- Vertical, to contact higher levels in the customer organization and more end users. When contacting different levels in an organization, it may not result in adding more opportunities directly into your pipeline, but can provide you with a better understanding of the company’s needs and decision-making process. This will assist you in preparing better proposals to defend against the competition trying to win work from your account. This better understanding can help you discover additional

► **The Amazing Dozen Donuts**

If there was a Prospecting Hall of Fame, this story would be hanging proudly on display. A sales manager of a city sales group was brainstorming with his sales team for innovative ways to capture more business. In many of the accounts, customers were splitting the work between his company and several competitors. In one sales meeting, a salesperson got an idea that every Friday the sales team should deliver donuts to a select group of accounts. His logic was that there was a chance these clients would need a supplier over the weekend and their operations team would often simply assign the work to the last salesperson they saw before the weekend. The idea was if the clients became confident that they would see the salesperson in the office every Friday morning, the customer would assign the weekend jobs to that salesperson. Therefore, as part of the company's client appreciation initiative, they would bring one to three dozen freshly baked donuts—chocolate covered, frosted, jelly filled—every Friday depending on the size of the account. The result was amazing! Salespeople identified up to \$100,000 of additional work being secured. As expected, when the salesperson stopped by to drop off the donuts and have coffee, operations staff started to ask the salesperson to come by their office before they left so they could brief them on upcoming work on the weekend. In this case, the convenience buyer behavior was resulting in the salesperson's company being assigned the work.



needs from the current account that enables you to sell more products and services within the same opportunity. This can be additional sales of similar or complementary products or selling up to higher levels of products or services.

- Wider, to contact other departments or locations within the same account or partners of the account. These departments may have similar needs and provide new opportunities for you to sell to them. This type of prospecting in current accounts is referred to as cross-selling. This will be discussed in more detail in the account development strategies in the “Account Management Plan” chapter later in the textbook. Current account prospecting leverages your current customers to act as reference or referral to gain access to new contacts. The access can be in several forms:
- Assisting you in setting up an internal marketing event, such as a lunch and learn presentation. For example, they assist you with identifying who should be on the invitation list.
- Introducing you to other people who may be interested in your products or services or have similar needs. This can be in person or through a telephone call or e-mail.
- Giving permission to use their name or reference your experiences with them.
- Providing a letter of reference that can be used internally and possibly externally.
- Co-authoring industry or white papers or success stories that can be used as sales collateral in future sales calls or marketing programs.

In the opportunities management process, this activity is recommended as part of the implementation stage for generating leads and references. In Chapter 1, referrals are classified as word-of-mouth marketing, which was identified as the number one influence for B2B purchasing decisions. Every salesperson needs to make securing referrals part of their prospecting activities in their current accounts.

Walking the Halls

When you have customers that you visit on a regular basis, always try to either arrive early or stay after finishing a meeting to give yourself time to walk the halls to say hello to contacts that you may not have spoken to recently. You should also have a list of customers who you have not met but would like to meet and give them your business. A great example of another version of walking the halls is in the sidebar “The Amazing Dozen Donuts.”

Multiple Visits

When visiting an existing customer, you should always try to schedule at least one more visit in addition to your primary visit. If the visit requires you to travel to another country, city, or location, try to schedule additional visits to fill the open time before or after your primary visit. As mentioned earlier, in current accounts you always want to establish more relationships. When you are already in the cus-

tomers building, you can ask your primary contact if they could introduce to another contact who they think may be interested in talking with you.

Referrals



Why are referrals so powerful? Part of the answer is contained in the first part of this chapter. It has to do with relationship and trust. According to one article on referrals, when you ask for and get a referral from an existing customer or business associate, there's more than simple familiarity working in your favor.⁵ You're tapping into existing relationships, which accelerate your ability to obtain new business. In typical selling situations, trust is the first and foremost issue in the mind of your prospects. The prospect asks himself or herself, "how do I know I can trust this person and this company?" Brian Tracy, author and sales training professional, cites building the trust bond as the critical first step in the selling process. He says building trust with customers is 40% of the process, followed by uncovering needs, presenting solutions, and asking for the decision. The value of the referral in this sense is illustrated below in **Fig. 6.4**.

Some salespeople feel it is not professional to ask for referrals and that good service is not something that should be rewarded, but expected. This is not why you ask for a referral. A referral is for your future customers. What you are trying to do is make it easy for them to believe and decide to have the first meeting with you. Getting referrals becomes more natural and easier when you use referrals as part of your sales call processes. Once you begin to make the use of referrals as part of your sales call processes, then you can refer back to your earlier meetings and have a conversation similar to this:

- Salesperson:** "Mr. Customer, how do you perceive the performance of our products for your operation?"
- Customer:** "So far excellent. Your products have done what you said they would."
- Salesperson:** "Thank you. I really do appreciate your comments. Do you remember when I called you the first time and I mentioned that your colleague, Mrs. Jones, recommended that I contact you?"
- Customer:** "Yes, I remember that very well."
- Salesperson:** "May I ask why you agreed to meet with me?"
- Customer:** "I respect Mrs. Jones and if she was satisfied, then I was pretty sure it would work for us."
- Salesperson:** "That is what I thought and now I would like to ask you, based on your experience, do you know anyone with similar needs as yours that could benefit from similar products? Calling someone new to ask for a meeting is a rela-

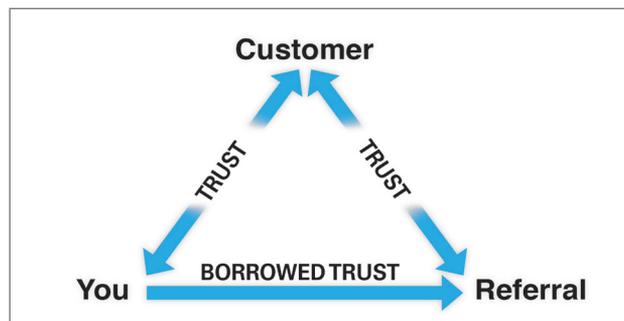


Fig. 6.4
Trust bonds already exist between you and the customer and between the customer and the referral. The referral process creates a level of borrowed trust between you and the referral, a great advantage for starting the selling process.

tively easy decision for the customer if someone they know and trust recommends the meeting.”

Customer: “Well yes, I do know of someone. Would you like me to introduce you?”

References

Salespeople should handle references the same as referrals. References are sales aids that can be used as proof when selling, specifically when supporting and handling customers’ negative reactions. Both supporting and handling customers’ negative reactions will be discussed in the next two chapters. References, like referrals, come from existing customers. The most compelling references are when the references are on the customer’s company letterhead and signed by the customer. There is an excellent example of a reference letter on page 208 in **Chapter Highlight 7-2: The \$200,000 Makeover**.

The conversation the salesperson may have asking the customer for a letter of reference might go like this:

Salesperson: “Mr. Customer, how do you perceive the performance of our products for your operation?”

Customer: “So far, excellent. Your products have done what you said they would.”

Salesperson: “Thank you. I really do appreciate your comments. Do you remember when we first met and, when I was explaining how our products would benefit your operation, I showed you a letter from Mrs. Jones stating that our products helped them reduce their rejection rates by 13%, reducing their production costs by 18%?”

Customer: “Yes, I remember that very well. In fact, for us the improvement may be even greater.”

Salesperson: “What is your estimate of your savings?”

Customer: “Closer to 20%. Our parts are more expensive than Mrs. Jones’ department.”

Salesperson: “Mr. Customer, can you give me a similar letter like what I showed you from Mrs. Jones? For my future customers, it is more compelling when someone like yourself, who is known in the industry, shares your success by using our products. If you want, I can write a draft for you and send it to for your consideration.”

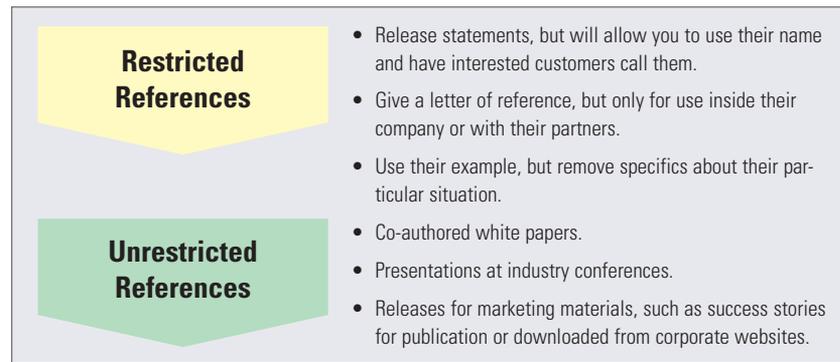
Customer: “Perfect. Send that to me and I will put the final version on our letterhead, sign it, and give it to you the next time we meet.”

Salesperson: “Excellent, I really appreciate it.”

As outlined in **Fig. 6.5**, some customers will provide references of different levels or restrictions:

- Give a letter of reference, but only for use inside their company or with their partners.
- Use their example, but remove specifics about their particular situation.
- No released documents, but will allow you to use their name and have interested customers call them.

Fig. 6.5
Restricted and unrestricted
versions of references.



All releases are good, and by using referrals and references during your initial contacting and sales processes, you are clearly demonstrating to the customer the purpose of the referrals and references. Other versions of references are:

- Co-authored white papers,
- Presentations at industry conferences, and
- Releases for marketing materials, such as success stories for publication or downloaded from corporate websites.

Whenever you use a referral or reference, you must take the time to do several things:

- When you use the referral or reference for the first time, let the customer that gave you the referral or reference know that you used it and thank them for their help. Show them your appreciation by inviting them to lunch or a social event or giving them something of interest, such as an industry report.
- When a customer gives you a referral, make it a habit to call upon the referral as soon as possible.
- When you use a reference and there is a chance the prospect may contact the customer, you must immediately follow up with the customer giving you the reference after the meeting in which you used the reference. If the prospect does contact the customer in regard to the reference, they may not remember what it is that you would like them to emphasize. Make it easy for them to help you and alert them they may be contacted. Review what you would like for them to communicate to the prospect.
- Always offer to write the letter of reference or have an example that you can leave with them.

A very good health check for any business is how many references, referrals, and other marketing materials are generated from current accounts on a monthly basis.

Networking

The salesperson should be looking for ways to increase the number of people you know. In a business context, there are many ways available for the sales professional to do this, such as the following:

- Professional societies
- Conferences and industry exhibitions
- Training
- Social events
- Social media
- Community activities

Professional Societies

These types of groups are perhaps the best form of business networking. If the audience of the professional society is your target market then there are many opportunities for you to meet new potential customers and competitors and to market or build your brand awareness. For example, if your company is selling upstream products and services to the oil and gas industry, there are many professional societies, such as the Society of Petroleum Engineers (SPE). The SPE has 143,962 members in 147 countries with 199 sub-sections or special interest groups. If your company sells computer parts and services, a great professional society to join is the Association of Computing Machinery (ACM). ACM has over 100,000 members globally with 37 special interest groups, holds 170 conferences each year, and provides more than 50 publications annually.

Each society offers networking opportunities, such as the following:

- Participating at annual conferences at which you have opportunities for presenting, exhibiting, and socializing
- Most professional societies are non-profit; as such, there are many opportunities for volunteers to work at conferences and social events
- Marketing opportunities such as advertising, training to sponsoring local chapter meetings, and lunches. Advertising can be done in printed materials and online websites
- Perhaps the best networking opportunity is becoming an active committee member

Be very selective when deciding which professional communities to join. Consider membership benefits such as access to papers, research and conferences as well as the number of networking opportunities in your area.

Conferences

Conferences are a great way to network and provide another opportunity for active participation. Planning is the key to getting the most from a conference as most conferences will have keynote speakers at breakfast and lunch. There are typically several sessions running concurrently during the day, so you have to choose which ones to attend. Some conferences will have several social events during the evenings. These are great opportunities to have your spouse join, adding another dimension to your networking efforts. For the major conferences, which can have literally thousands of attendees with many concurrent sessions, it is a best practice to plan as a sales team and ensure that targeted sessions and social events have a representative from your company. To ensure this happens, it takes a coordinated team effort. At the end of each day, the team should meet back together to debrief on the day's events and share contacts made during the day. It is also a good idea when there are multiple conferences relevant for your company create a conference calendar and assign specific people to attend, while others remain on duty and take calls for those attending the conference.

Training

Continued professional development and education are a great way to rejuvenate your professional drive and another great opportunity for networking. Training can be considered from two scenarios:

- Publicly available training
- Training as a marketing tool

► World Wide Webinars



By carefully selecting which publicly available trainings you register for, you can find yourself sitting with potential customers during the training and working in teams. Most publicly advertised training will state which companies attend and provide a roster at the training. Coffee breaks and lunches are great times to introduce yourself to people you have not met and trade business cards.

Training as a marketing tool is a very powerful networking tool. In this scenario your company can send invitations to targeted companies and individuals you would like to meet. There are a variety of options for training, varying from:

- Lunch and learns (popular in most industries), where guests arrive at 10:30 am, listen to a 45-minute presentation followed by question-and-answer session and then eat a buffet lunch.
- After-hours cocktails or dinners, following a similar format as the lunch and learn.
- ½ day training sessions, which start at 9:00 a.m. and finish at noon, followed by lunch.
- Multiple-day sessions.
- Webinars. Online training can be both live and on-demand. Webinars are one of the growing techniques companies are using today to create brand awareness and prospecting without many of the limitations of the traditional techniques discussed, and the number of webinar service providers are increasing every day. For some interesting webinar facts, see the sidebar “World Wide Webinars.”⁶

Do some research before your training to determine if your training session qualifies for continued educational units or credits and include this information in your invites. As in all marketing events, make it easy for your customers to request additional information or contact and collect feedback. Follow up after the training event to say thank you for attending and offer any further assistance.

Social Events

These types of events can take on many forms, such as entertainment, sporting, holiday activities. As with the conferences, there are many types of social events available, and planning and careful selection will ensure that you are rewarded for your time spent at the event. It is also a good idea to create a social event calendar and assign sales team members to specific events to ensure the best coverage of the events while maintaining people available to cover for those attending. Some social events have costs, so proper planning is critical to ensure the best return on the investment. Social events can also be a good opportunity to invite current customers and potentially new customers as part of your prospecting efforts.

Social Media

For a lot of people the Internet changed the way they think, work, and discover. Today online social media has created another option for networking. Some of the more popular social media online sites are LinkedIn, Twitter, and Facebook. Sites such as LinkedIn offer professional level accounts that are designed to make online networking more organized and effective. **Figure 6.6** on the next page is an example of the LinkedIn Premium subscription benefits as related to on-line networking and prospecting. Consider social media to build your personal brand. Create interesting posts, while allowing your audience to feel a personal connection to you. Leverage your core group to retweet items of interest, identify things you like, and follow others with similar interests as you. Give back to your groups by adding comments when you have insights to share.

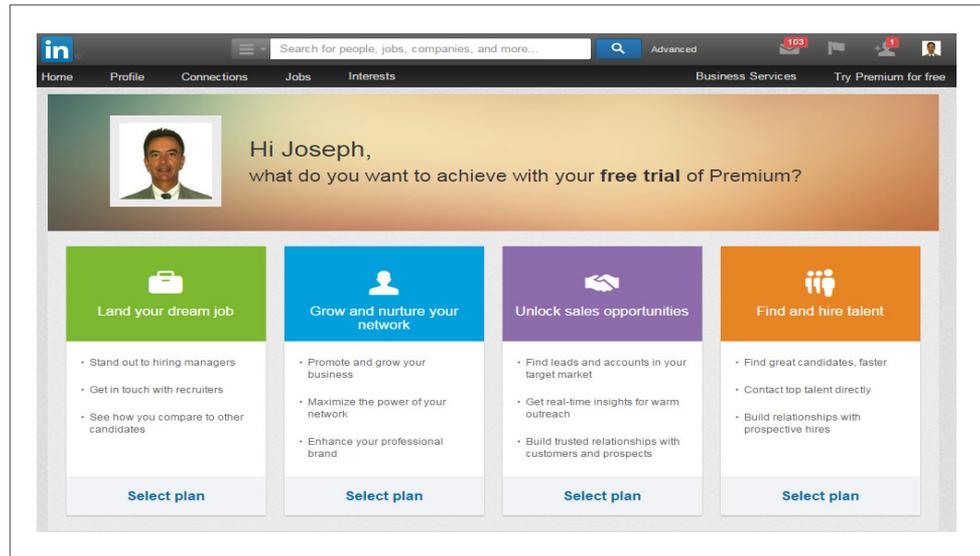


Fig. 6.6
LinkedIn Premium service targeted for online networking and prospecting.

There are many options for learning how to use social media effectively for prospecting, including on-line and instructor-led training and even entire conferences dedicated to the topic of social media. In addition, on-line social media offers an easy way for you to research contacts in preparation for your first meetings.

Community Activities

There is a saying that people prefer to buy from friends rather than strangers and, as one survey showed, people will consider recommendations from people they know the most. See the sidebar “Who Would You Trust?”⁷ Your participation in community activities is a great way to network and give back something to the neighborhoods where you live and work. As discussed in Chapter 1, in the buyer readiness section, buyers prefer to buy from companies and people with whom they have a favorable impression. There is no better way to build that favorable impression than by participating in local charitable events. If your company does not have a specific community or charity they sponsor, then ask your customers which community events or charitable groups and associations they support and do the same. The favorable impression and the good personal feeling you get from participating in these activities make this type of networking very rewarding.

Elevator Speech

The purpose of all forms of networking is to come into contact with people who may need or benefit from your products or services. At a networking event, you are not going to have a sales meeting. When you meet someone at a networking event, you want to follow these steps:

- Exchange pleasantries (introductions, including why you are attending or who invited you to this event).
- Ask questions about the other person (where are they from, is their family with them, etc.).
- Ask what line of business are they in.
- Inquire which company they work for.
- Find out what they do.
- Tell who you work for and what you do. Develop a thoughtful and engaging statement that describes you and your company. Describe what you or your

► **Who Would You Trust?**

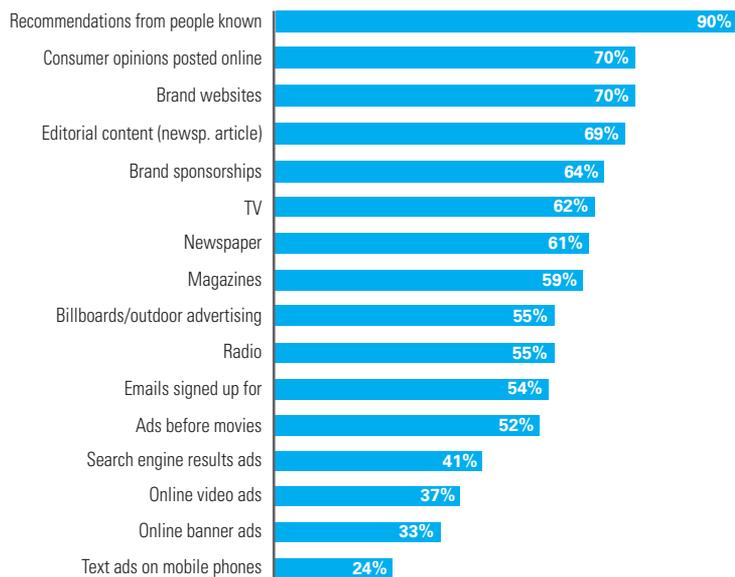
Recommendations from personal acquaintances or opinions posted by consumers online are the most trusted forms of advertising, according to the latest Nielsen Global Online Consumer Survey of over 25,000 Internet consumers from 50 countries.

Ninety percent of consumers surveyed noted that they trust recommendations from people they know, while 70% trusted consumer opinions posted online.

“The explosion in Consumer Generated Media over the last couple of years means consumers’ reliance on word of mouth in the decision-making process, either from people they know or online consumers they don’t, has increased significantly,” says Jonathan Carson, President of Online, International, for the Nielsen Company.

However, in this new age of consumer control, advertisers will be encouraged by the fact that brand websites are trusted at that same 70% level as online consumer opinions.

Have Some Degree of Trust* in the Following Forms of Advertising, April 2009



Source: The Nielsen Company

*E.g., 90% of respondents trusted “completely” or “somewhat” recommendations from people they know.

company does in terms of benefits your customers receive or what you help your customers do. Make sure it is not a selling statement. Networking isn’t about the sale. It is about the relationship.

- Listen to their response, and if it appears there is a business connection or other connection, exchange business cards or contact information. It is okay not to exchange business cards if giving the business card does not have value. If you do decide to give your business card but they do not offer you their card, it is acceptable to ask them for a business card. If they do not have one, then write their contact information on the back of your card.
- Ask if it would be okay for you to follow up with them appropriately, for example, to set a time for a meeting or send some additional information.
- Comment that it was nice meeting them and you look forward to meeting them in the future.
- If you are going to follow up with them, make a couple of notes on the back of their card to remind you where you met.

There are different versions of the elevator speech for different occasions. As the name suggests, the elevator speech is short with one purpose: create interest in you and your company and agree to a follow-up action. If you are in the reception area of your customer’s office waiting to go into a meeting and someone walks in who does not know you (or you them), this is a perfect time for an elevator speech. In this case, after you have determined who they are and what they do, rather than describing what your company does generically, describe the intended benefit of the meeting or presentation you are waiting for. Depending on their response, decide if a follow-up action is required. A very effective follow-up action for a senior executive is to ask them who would they suggest you talk to. In most

cases, they will recommend a gatekeeper or manager responsible for the relevant area and now you have a referral—perfect.

For your elevator speech to be effective, you have to think, plan, and say your elevator speech before arriving at the event. Think about the different types of people you might meet and what an appropriate follow-up action would be depending on the person's job, department, position, etc.

Cold Calling

As stated at the start of this section, prospecting and cold calling are what some people envision when people talk about sales. Unfortunately, most people have a negative opinion of this type of activity and would prefer not to do this, even though in many cases the person has never tried cold calling. As described in the sidebar “Making Cold Calls Warmer,” a cold call is calling someone you do not know but you want get their agreement to meet. At this meeting, there will be a sharing of information. The objective of the meeting is for you and your customer to agree that there is potential for your company to work for the prospect. In today's world, there are very few occasions when you should make a cold call. There are, however, times that you will want to meet people for the first time and set a time for that meeting. As with all prospecting activities, prior to making the call, do your research. You should have a reason for calling someone, as follows:

- A referral
- In your research you discovered their company has a program or project that is planned that will require your company's products and services
- They purchased from your company in the past and you are following up
- You or someone from your company submitted a proposal or quote in the past and you are following up
- They made an on-line request for more information
- You will be in their office or building, or city visiting with another customer and would like to visit with them
- Competitors of their company are benefiting from your products and services
- You are following up on an earlier correspondence you sent (e-mail, mail, etc.)
- Your company is holding a promotion, running trials, giving away samples, etc.

Once you have your reason for calling clearly established, then think about the call. A best practice is, in advance of the call, send an e-mail letting the person know:

- The reason you are calling them.
- Your value proposition.
- Time and day you will call. Also, give them an option to suggest another time and day for the call if what you suggested is not convenient.
- If they are not the correct person to contact, ask them to suggest the correct person to contact.

When you make the call, follow this flow:

- Introduce yourself and remind them you are following up on an earlier e-mail that you sent them.
- Exchange pleasantries.
- Explain the reason for the call and your value proposition.
- Ask a qualifying question.

- Ask to set a time or define the next steps.
- Check if they will invite anyone else to the meeting.
- Ask if there is anything else they want you to be prepared to discuss.
- Thank them for their time and tell them you are looking forward to the meeting.

An example conversation is below:

Customer: "Hello, this is Mrs. Jan."

Salesperson: "Good morning, Mrs. Jan. This is Mr. Salesperson from Company X. I hope you are enjoying the break in the weather this week."

Customer: "I'm not, but I hope I can this weekend."

Salesperson: "Yes, let's hope it stays. Mrs. Jan, I'm following up on an earlier e-mail that I sent on Monday. Did you receive that?"

Customer: "Yes, I did."

Salesperson: "Great. As I stated in my e-mail, Mr. Partner recommended that I contact you as he said that you have a very similar project coming up in the next 12 months and he felt your project would be as difficult as his. Is this still in your plans?"

Customer: "Yes, it is and it will be very similar."

Salesperson: "In Mr. Partner's project, he was dealing with some very tough deadlines. He decided to use our FAST service, which he estimated reduced his project days by 10%, which allowed him to meet his project time-line. Is that something that you would be interested in?"

Customer: "Yes, indeed."

Salesperson: "What I recommend is for us to meet and discuss your project so I can understand your objectives and your critical success factors. Then I can make some recommendations as to what type of products and services would best help you. Do you have time for a 30-minute meeting next Monday at 10:00 am?"

Customer: "That works for me, and I will have a couple of other team members in the meeting."

Salesperson: "Oh thank you. And may I know their names?"

Customer: "Yes, my operations manager, Mr. Smith, and my procurement manager, Ms. Putu."

Salesperson: "I'm looking forward to the meeting. Is there anything else you want me to come prepared for?"

Customer: "No, but thank you for asking. See you next week."

The cold calling practice is not only for new clients. It can be done with customers you are currently working for. As mentioned earlier, during the implementation stage of a customer's project, you should leverage your existing relationships to meet more people in the customer's organization. Follow the same format for a cold call when calling new contacts in existing customers' organizations.

E-mail Marketing

E-mail is a nice complement to cold calling. It is also an important part of the corporate MCP program that can be leveraged by the salesperson. The idea is the salesperson registers on their company e-mail subscription list. When there is an e-mail update sent from the corporate MCP that the salesperson believes is relevant for target customers, the salesperson forwards the e-mail to his or her customers to build awareness and the customer's reply for further information will be sent back to the local representative. For this to be used as a prospecting technique, the salesperson must have an e-mail list of potential customers. This same list can also be used to send out local success stories and announcements.

The purpose of a prospecting e-mail is to create awareness and generate interest so the recipient can request further information or follow-up. Below are some guidelines for creating e-mails as a prospecting tool. They need to be created with the purpose of generating interest. As such, an effective format for a marketing e-mail is:

- **Interest-generating subject line.** The most important element of effective e-mail marketing is the subject line, which can be thought of as the headline, according to Linda Pophal, author of *Direct Mail in the Digital Age*.⁸ The headline should provide a short, immediate, and specific benefit to the audience, she says, and must also avoid including words likely to get caught up in spam filters because they sound like “advertising talk”—a word like “free,” for instance.
- **Personalized.** Use the name of the receiver and send it to one person at a time. This is simple to do with the mail-merge option in most e-mail software packages, such as Outlook. The salutation you choose immediately indicates if you cared enough to figure out who should really receive your e-mail, or you just picked a name out of a list. It also communicates respect, professionalism and friendliness.
- **Body of the message.** Be brief and to the point. You want your prospects to be so compelled by your e-mail that they'll act now. To make that happen, you must include key pieces of information: the prospect's specific need, expected benefits, demonstration of capabilities, and call to action. Best practice is keep the message in the body to 75-125 words. Keep paragraphs brief and vary the length. Draft the e-mail and send it to yourself. How does it look in your in-box? See if it grabs your attention when you open it and begin reading. Leverage your work. Use the same e-mail for prospects that have similar needs.

► **E-mail—Could Get You \$16,000—A \$16,000 Fine That Is!**⁹

Compiling an e-mail list of people who have opted in to receive information about products and services is a no-cost, high-performance means of connecting with target prospects through e-mail. Giving consumers the opportunity to opt in keeps e-mail marketers in compliance with the Federal Trade Commission Controlling the Assault of Non-Solicited Pornography And



Marketing Act of 2003 (FTC's CAN-SPAM) regulations, guidelines that say what e-mail marketers can and cannot do. Failure to comply may result in fines as high as \$16,000—per e-mail—according to the FTC. The main requirements include not using false or misleading header information or deceptive subject lines, clearly identifying messages as advertising, and including contact information and business location. In addition, the sender needs to include information about how recipients can opt out of receiving future mailings.



- **Call to action.** Make it easy for your reader to ask for more information or request a contact. It should be one click and require a minimum amount of information before clicking send.
- **Lead-generating signatures.** Your signature is not just the opportunity to provide all your contact information. Use it to hook your prospects into learning more about you and your company with a simple click.
- **Opt-out option.** The reader with one click should be able to be taken off your mailing list. (See “E-mail—Could Get You \$16,000—A \$16,000 Fine That Is!”).

Tracking

One of the most critical factors of a successful prospecting plan is persistence because the results from prospecting may take time to materialize. Like all programs, to understand how effective you are, you must track the results, such as which prospecting efforts return results as measured by new business, repeat business, generating more leads, and size of orders. Also, once a prospect has been contacted but does not have an immediate need, it is very good practice to keep in regular contact, possibly through marketing programs and periodic follow-up via telephone, web, social media, sms, or e-mail.

If your prospecting efforts do not get a response from the prospect the first time you make contact, then set a reminder to follow up. The customer’s silence may not be due to a lack of interest but bad timing. Your follow up may very well be appreciated when they have more time to talk to you.

After a successful prospecting effort, you have potential buyers and opportunities that are in the sales stage-lead. The next activity is to qualify the lead and determine if there is a real opportunity for which the customer will spend money and purchase products or services from you or your competitor. This sales activity is called qualification.

Qualification

To qualify a lead, you complete an opportunity level 1 opportunity assessment as discussed in Chapter 4 “Opportunities Management,” Stage 2 Identification of the Compelling Event.

The level 1 assessment, as described earlier, contains four categories of questions:

- Is there an opportunity?
- Can you compete? Do you have a competitive offering?
- Can you win? Do we have sufficient buying center support?
- Is it worth winning? Will it earn your required profits or is the opportunity strategic?

To change an opportunity from lead to confirmed lead sales stage, the salesperson must, at a minimum, answer the first category of questions: “Is there an opportunity?” To facilitate this discussion with the customer, the salesperson should use the Project Solution worksheet, as described in Chapter 4.

The earlier and faster the qualification activity can be completed, the sooner the salesperson can decide if they should spend more of their time trying to win the opportunity. However, as with all of the sales activities, there are no shortcuts and the salesperson must complete the qualification by talking with the customer. See the sidebar “Let Me Try Mental Telepathy First. I Hear It Works.” The other common issue with the qualification activity is the qualification is not done or the qualification is done too late. The qualification activity needs to be as soon as

► **Let Me Try Mental Telepathy First. I Hear It Works.**



“Scientists claim ‘telepathy’ success after sending mental message from one person to another 4,000 miles away.”¹⁰

They connected one person in Mumbai, India, to a wireless headset linked to the Internet and another person to a similar device in Paris. When the first person merely thought of a greeting such as *ciao* (Italian for “hello”), the recipient in France was aware of the thought occurring, according to a report in the journal: The subject receiving the message could not comprehend the word itself, but could report flashes of light in their brain that corresponded to the exact moment when the word *ciao* was being thought.

Well, this has some way to go before salespeople can sit in their offices and rub their temples to have a conversation with their customers. Too often, when salespeople are asked who told you that, there is a moment of silence that means “no one, it is what I assumed.” This is not good enough in the qualification activity. When completing an assessment, if the information has not come from a conversation with the customer done by the conventional means, then the assessment for that factor is ?.

In sales, if you do not know or have not asked the customer, don’t guess. It is very dangerous to make strategies from assumptions when the customer is only a conversation away.

possible so the salesperson removes low probability opportunities and focuses their time on the confirmed opportunities. During the qualification activity the salesperson is retrieving information about the opportunity and the people involved in the customer’s decision-making team.

The qualification assessment is conducted by answering the following questions and assessing a negative –, question mark ?, or, positive + depending on the answer to the question. The questions below are more detailed than originally discussed in Chapter 4 “Opportunities Management.”

Question 1: Customer’s Application of Project

- What is the objective of the customer’s project?
- Do you understand the connection between the company’s vision, goals, and objectives and requirements for the project?
- If you can answer these questions, evaluate this as + to indicate it has been defined by the customer.
- If the customer has not defined the requirements, select – for undefined. If you do not know or understand the requirements, select the ?.

Question 2: Customer’s Business Profile

- What is the account condition, as described in the account corporate profile?
- If the account is in a strong position, select the + for strong. If not, select – for weak. If the business profile is unknown, select the ?.

Question 3: Customer’s Financial Condition

- Customers in a strong financial condition are evaluated as +.
- For lesser known accounts, you should check with your controller for input on the customer’s financial condition and payment practices. Your financial department will use credit ratings and other financial reports to determine the account’s financial condition. If the financial condition is weak, select the – option; if it is unknown, select the ?.

Question 4: Access to Funds

- Have funds been allocated to this project, and if they have, what is the budget?
- If not, what is the approval process, and what are the chances of approval for this project?
- Are other competing projects more likely to be selected before this project for the current fiscal year?
- If funds have been approved and you know the budgeted amount, select the +. If not, select –, and if you do not know the answer, select the ?.

Question 5: Compelling Event

- Why does the customer have to do the project and when will the customer do it?
- What are the expected outcomes and paybacks?
- What are the consequences if the project is delayed or accelerated?
- Who has the objective for implementing the project?
- Who is the sponsor of the project?
- If you can answer these questions, the compelling event is defined as a +. If not defined, select the –, and if you do not know the answer, select the ?.

Meet Ben Duffy

This is an old story, but vitally important in understanding the power of empathy and questions.



Ben Duffy (1902–1970) was a high school dropout from Manhattan’s Hell’s Kitchen neighborhood who eventually became an icon in the advertising world.

Literally going from the mailroom to the presidency of BBDO, a worldwide advertising agency headquartered in New York, he had a stellar career that advertising people still talk about today. BBDO currently has over 15,000 employees and is the most awarded agency network in the world. Many would argue that much of that success is the result of Duffy’s work.

How Duffy Discovered the Power of Empathy

Many years ago at American Tobacco, the largest tobacco company at that time, an ad account was available and every advertising agency in the country was aggressively pursuing it. At that time, Duffy owned a small advertising agency and was eager to obtain an account of this size.

Among his competitors were several very large agencies with more money, more resources, and more staff. Duffy had an appointment with the president of the tobacco company coming up soon. He thought to himself, “How can I possibly compete with these large agencies? What can I offer this company that the big boys can’t?” The more he tried to prepare, the more frustrating the situation became. He just could not see how his little company could compete.



After some time, he realized that “How can my small company compete with the big companies?” was the wrong question. He had been approaching the situation from the point of view of a salesperson, not from the client’s point of view.

Key to Successful Selling

On that day, Duffy discovered the key to successful selling: empathy through questions. He thought, “I’m going to put myself in this guy’s shoes. I’ll think of all the concerns and questions that I would have if I were him.” He wrote down fifty questions, then honed them down to the ten he thought would be most important to his prospect.

When the day of the appointment arrived, he sat down with his potential client and said, “In preparing for today’s meeting, I put myself in your position and thought there were probably some things that you would like to know about me, my company, how we do business, and what’s in it for both of us. So I have prepared a list of ten of those questions.”



The tobacco company president looked surprised and said, “Well, that’s interesting, I wrote down ten questions for you, too.” They swapped lists, and six of the questions were exactly the same.

Based on Duffy’s preparation and the similarity of the lists, the president of the tobacco company decided that maybe the two companies did have something to talk about.

Guess who got the account?

Another key point to remember when in the qualification activity is you not only need to qualify the opportunity, but the customer also needs to assess and qualify you and your company as an acceptable supplier. There is a very famous story about how one salesperson was able to secure the biggest opportunity of his life by not only preparing his questions for his first meeting but also preparing a list of questions he thought the customer may have of him. See **Chapter Highlight 6.2: “I Got Questions. You Got Questions”** for the rest of the story.

When having sales-related discussions with the customer, you apply a consultative and customer-focused selling approach following what is called the need-satisfaction selling process. The professional selling processes have developed over many years. In their literature search on B2B selling, authors Terry Bacon and David Pugh read books written as early as 1894.¹² Since that time, professional selling has gone through a continuous evolution, becoming more relationship based, customer focused, and value driven. A brief history of the professional sales development is provided in **Chapter Highlight 6.3: From the Sea to Sales: The Evolution of a Profession**.

The consultative selling approach used in conjunction with the need-satisfaction process are two of the guiding principles for professional salespeople today. These concepts will be used throughout the sales activities for both large and small sales. Chapter 7 will provide a detailed look at sales call skills used to execute the need-satisfaction process.

The next activity after qualifying an opportunity to confirmed lead is sales meetings.

Sales Meetings

In the opportunities management process described in Chapter 4, sales meetings are the core activity in Stage 3a Evaluation of Options. Once an opportunity has been confirmed (assessment question “Is there an opportunity?” is answered yes), then the next three questions of the opportunity assessment are evaluated. Answering these questions will determine if the opportunity is a sales opportunity that you want and you can win. There are many times when there is a confirmed opportunity,

but a company competing for the work will never win because of one or more reasons in the assessment. To answer the next three questions in the assessment, the salesperson uses the request for proposal interview form (described earlier in Chapter 4) to hold further conversations with people in the buying center from the customer’s organization. By using the request for proposal interview form, the salesperson should be able to answer the following questions.

Can You Compete?

Question 6: Formal Decision Criteria

- A fully defined formal decision criterion meets the requirements described in the vulnerability analysis described in Chapter 4. The customer must have a defined set of criteria ranked from critical to incidental and have an evaluation model by which to evaluate the competing offers. You should know who has created the decision criteria. If approval comes from depart-

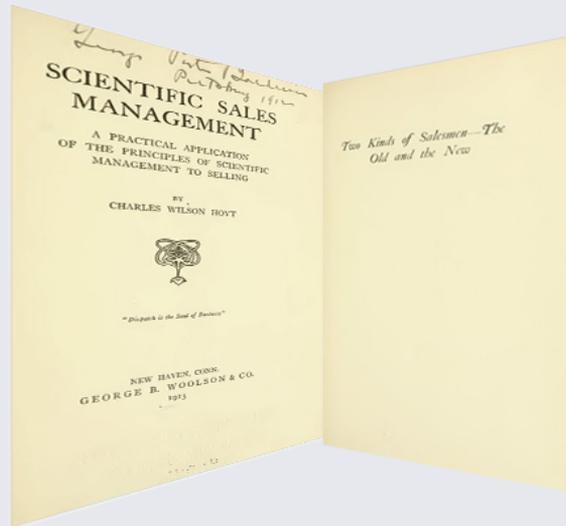


Chapter Highlight 6.3: From Sea to Sales: The Evolution of a Profession

The selling presentation has changed over the years. The changes are a reflection of the nature of the economy and underlying theories of how people buy. The following periods witnessed different approaches to selling:

Agrarian Age. 1850 and earlier. Selling was based on self-learned skills of salespeople. There were no major efforts to study the art of selling.

Early Industrial Age. 1850–1920. The economy of the United States began to shift from an agrarian economy to industrial. With the rise of manufacturing, salespeople became of increasing importance to the economy. During this period, owners of factories began to shape the army of salespeople from a loose network of “peddlers” to a more organized selling force. For example, around 1850, Cyrus McCormick (the inventor of the wheat reaper and thresher) organized a national network of selling agents who operated on stricter selling controls than the peddlers of the past. As time went on, manufacturers such as Gillette, Eli Lilly, Scovill, and others began to hire salespeople specifically to represent one company. This was a dramatic change from the past. In 1894, William Miller wrote *The Art of Canvassing: How to Sell Insurance*.¹³



From 1910 to 1920, there was a growing interest in improving the selling process. Psychologists, notably Freud and Jung, essentially founded the discipline during this period as many of the new psychologists began to study the buying process. They were interested in discovering the mental states that buyers went through so that salespeople could better influence the buying process. Chicago-based System Company published *How to Increase Your Sales: 126 Selling Plans Used & Proven by 54 Salesmen & Salesmanagers* in 1908. Fredrick Taylor published one of the most influential management books ever written, *The Principles of Scientific Management*.¹⁴ In 1913, C Hoyt, influenced by Taylor wrote *Scientific Sales Management; a Practical Application of Principles of Scientific Management to Selling*.¹⁵ (pictured above).

As early as 1911, psychologists were studying and describing the mental states that customers would exhibit as they proceeded through various phases of making a purchase. At this time, the buyer action theory was developed, consisting of five stages: (a) favorable attention, (b) interest, (c) desire, (d) action, and (e) permanent satisfaction.

Mature Industrial Age. 1920 to 1950. Building upon earlier psychological observations, in 1922, Edward K. Strong's first book, *The Psychology of Selling Life Insurance*, became the first academic book on selling.¹⁶ Strong attempted to translate the abstract psychological customer descriptions and observations into concrete techniques that could be used by salespeople. In the section “The Tactics of Selling,” (pp. 351–465), Strong talked about tactical selling techniques as a series of five steps. He prescribed presentation techniques that salespeople could use to cause the potential customer to enter each of the psychologically described buying mental states, thereby leading them to buy. This approach is still being taught today and is prevalent in traditional “transactional selling.”



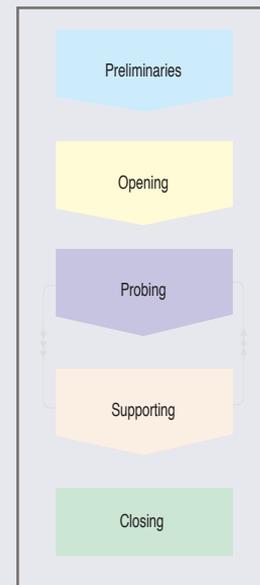
Post-Industrial Age. 1950–1980. Selling and marketing made a tremendous leap forward. Led by marketing researchers, the marketing concept was introduced to industry by academicians. The concept began its journey of wide acceptance in sales and marketing theory. The marketing concept uses a customer focus as opposed to a seller or product focus. Essentially, the selling practices as advocated by Strong in the 1920s were “seller-centric”—that is, they were focused on the various techniques that could be applied to the customer to induce or make them enter mental states that would lead to buying. The marketing concept advocated that sellers start

Chapter Highlight 6.3: From Sea to Sales: The Evolution of a Profession (cont.)

with customer needs and then try to satisfy these needs. The marketing concept led to a new theory of buying called the need-satisfaction buying theory is shown to the right and will be discussed in detail in Chapter 7 “Sales Call Skills.”

The need-satisfaction buying theory is the basis for “consultative selling.” Essentially, sellers adopt the philosophy that they are consultants to help potential customers solve need problems; the customer has a problem to be solved, and the product/service has the potential benefits to solve the problem. This approach to selling is “customer-centric.” The seller adds-value and is important to the buyer throughout the buying process. The theory states that the buyer goes through the discrete steps to make a buying decision, especially a decision on complex and expensive products/service. The consultative selling approach consists of five steps:

1. Recognition of Needs: The value that a salesperson can add in this stage is the help customers recognize and the definition of problems and needs in a new or different way.
2. Evaluation of Options (Alternative products): The value that a salesperson can add here is showing superior solutions, options, and approaches that customers may not have understood or considered.
3. Resolution of Concerns (Decide on one of the alternative products): Value here is created by the salesperson helping customers to overcome and remove obstacles to acquisition.
4. Purchase (Logistics of acquisition): The value a salesperson can contribute here is making the purchase painless, convenient, and hassle-free.
5. Implementation: The salesperson adds value by showing customers how to install and use the product/service.



The Need-Satisfaction Buying Theory

Information Age. 1980–present. The United States was “on the ropes” economically as it fought increasing global competition. The “Toyota Phenomena” and the quality movement invaded the US economy. The country responded by copying the Japanese and other competing global companies. With a proliferation of look-alike quality products, competition for customers began to shift to more abstract nuances to differentiate one product from another. The salesperson, as well as his or her supporting company, became an important component of the product or service that the customer considered as value. In addition, the growing proliferation and availability of information (the Internet and web) developed a generation of increasingly informed buyers.

In the past, salespeople were primarily providers of product/service information. However, the increased availability of information to buyers began to shift the salesperson’s primary roles. Salespeople now had to reexamine who they were and why they existed. While their traditional role of providing the means to make “transactional” sales was still important (there are still many products/services today requiring this approach), the legacy of the marketing concept and adding value within the need-satisfaction buying theory of the buying process became increasingly important.

Thus, for many commoditized (standardized and look-alike) products/services, potential customers are relatively sophisticated and have access to information. They do not need salespeople to make a buying decision. “Transactional selling” is also taking place electronically. However, for complex, customized products and services, salespeople need to add value during the buyer’s need-satisfaction buying process. This consultative selling approach has its roots back to the 1920s and was documented by W. F. Hypes who wrote a chapter titled “The Salesman as the Customer’s Partner” in the System Company publication *How to Increase Your Sales* mentioned earlier.¹⁷ In modern times, the first book published on this topic was Marck Hanan, James Cribbin and Herman Heiser’s *Consultative Selling*, published in 1970.¹⁸

The remainder of this book will leverage these pioneers’ thinking and contributions to the professional selling community. In addition, many more of the modern thought leaders’ works will be referenced to build actionable sales processes for today’s competitive world of sales.

ments outside the account (such as partners and government agencies), you must meet with them and determine whether they have the same decision criteria.

- Do you know the process for approval in such situations? If you believe the customer (including external approvers) has well-defined decision criteria, select +. If not, choose –, and if you do not know, evaluate the question as ?.

Question 7: Solution Fit

- Will you be evaluated as strong or weak against the customer's decision criteria when compared to competitors?
- Can you do anything to improve your evaluation, such as redefining the decision criteria or addressing the customer's negative reactions, such as misunderstandings, skepticism, or drawbacks?
- How do the most influential buying center members rank our solution? If you believe you will be evaluated as strong, select +. If weak, choose –. If you do not know or have not validated your expected ranking with someone in the buying center, select ?.

Question 8: Resource Requirements

- For you to secure and implement the project, will it require additional resources and investment?
- Are there other projects that could use the resources if you do not do the project?
- Must you make significant modifications to your solution to qualify?
- Must you invest significant time and effort to sufficiently analyze the risk and build a complete proposal that makes a strong business case? Input from the business managers should be provided for large projects. If the resources required are low, select +. If high, select –, and if you do not know, select ?.

Question 9: Current Relationship

- What is the status of your current relationship?
- Do you have an ongoing business relationship, and are you working with the customer on other projects?
- How well do you know the key buying center members?
- When completing this question, compare your relationship relative to the competitors. To answer this question, only one company should be evaluated positively to reflect their competitive advantage. The company with a + will most likely have information in advance of their competitors and could also be the company the customer will speak to last before making their final decision. For the company with the strongest relationship, select +. For companies with weaker relationships, select –, and if you do not know, select ?.

Question 10: Unique Business Value

- What differential value does your solution bring to the customer's project? To answer this question, you should complete the customer value analysis and validate your differential value with appropriate buying center members.
- In which of the five common differentiating factors (product or services, service quality, company capabilities, service and support personnel, and price) do you provide differentiated value? Will your value be evaluated in the decision criteria?

- If you have significant differential value that will give you a competitive advantage, select +. If you do not have differential value, select – , and if your differential value has not been validated, select ?.

Can You Win?

Question 11: Inside Buying Center Support

- Do you have mentors and supporters inside the buying center?
- Can they influence the purchase decision, and will they act on your behalf?
- Do the competitors have more inside support?
- You should be able to reference specific actions of the mentors or supporters to prove their support. If you believe you have significant inside support that improves your chances of securing the opportunity over the competitor, select + for strong, – for weak, and ? if you do not know.

Question 12: Executive Credibility

- Do you know which executives have an interest in the project? Do your executives have on-going business relationships with them?
- How do they know you if they are not a current account?
- Do the customer's executives consider you a vendor, problem-solver, or trusted advisor?
- Can your executive make contact with the account executives easily during the resolution of concerns and monitoring stages of the procurement phase? These factors were explained in Chapter 4 “Opportunities Management” in the procurement phase section. If you have an active account management program, you should be in a good position relative to your competitors. If you are in a strong position, select + ; if in a weaker position than the competitors, select – ; and if you do not know, select ?.

Question 13: Cultural Compatibility

- Does your account relationship profile indicate a good match between what the account wants from its suppliers and what you provide? (This is discussed in Chapter 13 “Account Management Plan.”)
- Does your company have executive-to-executive level ongoing business relationships?
- Does the account consider you the best company to work on this project?
- If you are not well positioned, what would you have to do to gain a better position? Is there time? If corporate compatibility is good, select + ; if it is poor, select – ; if you do not know, select ?.

Question 14: Informal Decision Process

- What will be considered beyond the formal decision criteria, and who will contribute to the final purchase decision? If external departments or government agencies have to give final approval, do you understand their informal decision process?
- Do you have previous experience knowing what it takes to get approval beyond having a best-evaluated solution?
- Have you had a previous experience with the account where an award or loss was turned around in the late stages?

- What issues can be negotiated? If you are confident you understand the informal decision process and have a plan to manage it, select + ; if you are not capable or do not have the right contacts and supporters, select – ; if you do not know, select ?.

Question 15: Political Alignment

- How well aligned are you with the high-influence buying center members? Are they supporters of your company?
- Do you know their business and personal agendas? Can they change the decision criteria after the evaluator or decision-maker submits a recommendation?
- Will they act on your behalf?
- Do you have more influential supporters than the competitors?
- Who has the most powerful buying center member as their supporter?
- If external departments or government agencies have to give final approval, are you in alignment with their powerful approvers? If you believe you have a stronger political alignment than your competitors, select + ; if you are weaker, select – ; if you do not know, select ?.

Is It Worth Winning?

Question 16: Short-Term Revenue

- Is the short-term revenue for this calendar year high or low?
- Once the contract is awarded, can you sell additional services or expand the work scope?
- Will there be other projects coming in the short term that would enable you to leverage the resources allocated to this project?
- Will your equipment and staff be utilized at full capacity, or can you generate other revenue with the same resources from other projects unrelated to this opportunity?
- Is there anything you could do to improve short-term revenue? If the resources for this project have a reasonable probability of generating high short-term revenue, select + ; if low, select – ; and if you do not know, select ?.

Question 17: Future Revenue

- Ask the same questions as the short-term revenue questions but now from the long-term perspective.
- What kind of year-on-year growth might you expect in future revenue streams?
- If long-term revenue-generating prospects are high, select + ; if low, select – ; and if you do not know, select ?.

Question 18: Profitability

- Is the expected profitability high or low?
- What would have to happen to increase profitability?
- Could you negotiate items that would improve profitability or lower your costs?
- Does the level of expected profitability warrant the resources, or are there more profitable projects that could use the resources?

- Do you have contractual protection for the resources requested, but not used? If profitability prospects are good, select + ; if they are not or are low, select – ; if you do not know, select ?.

Question 19: Degree of Risk

- What are the levels of technical, financial, and other risks associated with the project?
- What are the risks of the customer not fulfilling the work scope, ending the project early, or canceling the project? How could you cause your solution to fail?
- What are the critical dependencies in delivering value to your customer?
- How could the customer cause your solution to fail?
- What is the impact on your business if the solution fails?
- How much investment do you need to make to start the project?
- How much of this investment is at risk? If the risk profile of the opportunity is low, select + ; if it is high, select – ; if you do not know, select ?. If the risk factor is high, what could you or the customer do to reduce it?

Question 20: Strategic Value

- To determine whether a project is strategic, you must determine whether the project is more profitable than other projects of the same time period that use the same resources. If so, why?
- Do long-term account factors such as product development or competitive issues make winning this project strategic? To answer this question when resources are limited, it is advisable to obtain upper management input. The strategic value of a project is best answered by upper management. If the strategic value is high, select + ; if it is low, select – ; if you do not know, select ?.

With the assessment completed, the salesperson then decides on the appropriate sales strategy for this opportunity. The opportunity sales strategies were described in detail in Chapter 4. The options are:

- **Disengage.** This strategy is chosen when the salesperson decides this is not a sales opportunity their company can win. This can be the result of too many negatives in the assessment analysis and or they do not have enough time to try and improve their position or the opportunity is not attractive. The sales stage will be set as disengage and as per guidelines described in Chapter 4. Once the outcome of the opportunity is known the salesperson sets the sales stage to closed lost and record in their CRM system which competitor won and the estimated value of the deal.
- **Attack.** The salesperson believes they can win this opportunity and selects one of the competitive sales strategies as described in the opportunities management process. The sales stage will be set frontal, flanking, defend, or fragment. In the attack mode, the salesperson executes their sales strategy as described in Chapter 4, focusing on building buying center support for their proposal.
- **Develop.** The sales proposal will not be presented in the current calendar year. The salesperson will stay engaged with the customer to improve their position and use the develop sales strategy tactics as described in Chapter 4. Most companies have well-defined guidelines for reviewing sales opportunities before making the final decision to disengage or pursue and which competitive sales strategy to select. This process will be reviewed in Chapter 7 “Strategic Sales Plan.”

During the sales meetings activities, the salesperson will use their probing skills to retrieve more information about the needs and concerns the people in the buying center have about the opportunity. Once they have a good understanding of the customer's needs, the salesperson is then ready to present their proposal, which is the next step in the sales activities.

Present Proposals

In this sales activity, the salesperson uses the skill of supporting in the need-satisfaction process. The skill of supporting will be discussed in detail in Chapter 7 "Sales Call Skills." When the salesperson begins to present their proposal or, in a more formal bidding process, receives the request for proposal from the customer, the opportunity sales stage is set to bid/proposal.

The effective creation and presentation of proposals requires a number of sales skills as shown in **Fig 6.8**. The need-satisfaction process skills of opening, probing, supporting, and closing will be discussed in the next chapter. Handling objections, and negotiations have dedicated chapters later in the textbook. Communication skills were discussed earlier. Proposal writing skills will only be touched upon for a couple of critical aspects of the proposal, and there is a dedicated chapter for competitive tendering that includes a discussion of factors to be covered in tender submissions.



Fig. 6.8
Presenting proposals is a multifaceted sales activity.

Writing proposals is a process that starts early in the opportunity management process and leverages the outcomes of each of the sales activities. A four-step process shown in **Fig 6.9** is followed to create a powerful customer-centric proposal. Each of the steps will be described in more detail next.

Step 1: Determine Content

The best tool to collect your proposal content is the client interview form and, in particular, the request for proposal form. These forms help the salesperson to have customer-focused conversations with people in the customer's buying center.

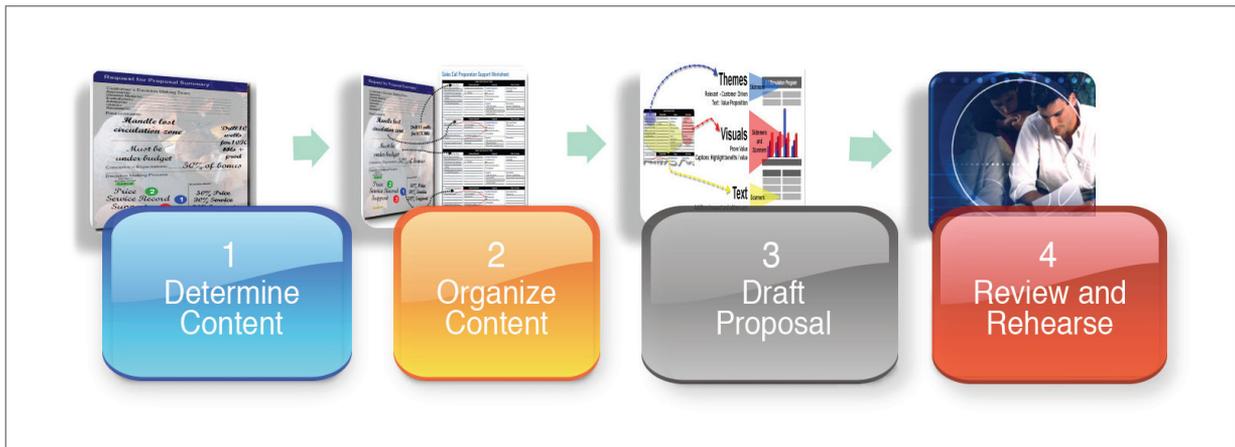


Fig. 6.9
Four-step process for creating a powerful customer-centric proposal.

Step 2: Organize

To organize the content, use the Sales Call Preparation Support Worksheet, which will be discussed in detail in the next chapter. In general, for each one of the customer's stated requirements, you will identify which products or services you have that will be used to satisfy that need. In advance of presenting the proposal, consider the buyer's profile information and determine how to best present this information. Also at this time consider what negative reactions you may encounter while supporting this need and include in your proposal a demonstration of capabilities to make it easy for the customer to believe. Organize your proposal around three to five main components that are important to the customer. A fatal mistake for some salespeople is to discuss only what they do better than the competition and not, without talking about where they are the same or weaker. This will be discussed in more detail in the next chapter.

Step 3: Draft Proposal

There are many ways to write a proposal. One way is to organize the proposal components of a customer-centric proposal as shown in Fig. 6.10. This format is very common and has been proven to be effective.

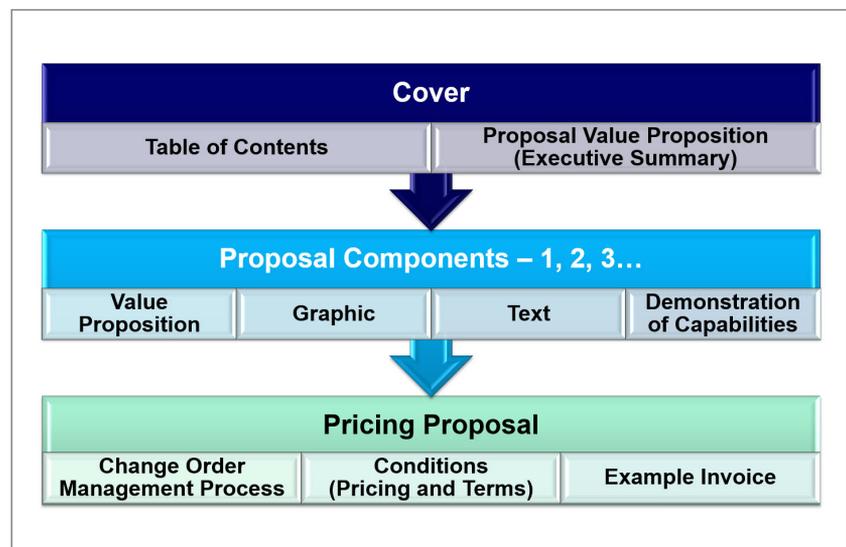


Fig. 6.10
Components of a customer-centric proposal.

Customer Logo

Customer will have improved operating efficiency and reduced costs. That will make selecting supplier the best business decision for the customer's project name.

Part 1: Why Should Customer Choose Supplier Over a Competitor	2
Supplier's Commitment to Safety.....	3
Description of Local Operations Personnel.....	4
Description of Support Base	5
Local Support Staff.....	6
Unique Fishing Prevention Equipment	7
Big Hole Logging Equipment \$1,500,000 Reduced Rig Costs.....	10
Special Emergency Services Package.....	10a
Part 2: The Advantages for Customer using Supplier's Advanced Technology.....	11
Reduced Rig Costs by \$300,000 with the Combinable Tools.....	12
Faster Operations Reduce Rig Costs by \$50,000	14
Rig Time Saver (RTS) Combo.....	15
Operational Advantages of: <i>Tools for Fracture Identification</i>	17
<i>Resistivity Measurements for accurate net pay calculation</i>	18
<i>Advanced Imaging for accurate wellbore stress analysis</i>	19
Special Note on QC	20
Part 3: Competitive Pricing Proposal.....	22

Supplier Logo

Fig. 6.11
Table of contents to facilitate proposal presentations.

Cover

Place the customer's logo on top of the pages and your company's logo on the bottom. Include a simple title, date, prepared for who, and prepared by. There should also be a back cover, again with the customer's logo on top and your logo on bottom. The covers add a professional look to your proposal.

Table of Contents

The table of contents is more than headers and page numbers. Not to minimize the importance of having a simple way to navigate the proposal, but the table of contents also adds a professional touch to the proposal. A clever way to write the table of contents is to indicate the proposal component name and the benefit. This is another way to emphasize the added value of your proposal. The table of contents is also a useful tool for your supporters to easily find the key points they will use to defend the selection of your company. Shown in Fig. 6.11 is an example of an effective table of contents for a real proposal.

Proposal Value Proposition

This is an executive summary, meaning it is less than one page. The executive summary should be from the customer's perspective; start with the customer's name, restate the customer's objectives, and then define what it means to the customer when they choose your products or services. A customer-centric way to think about value for the customer is the value stairs, shown in Fig. 6.12. At the base of the stairs is the way salespeople think about their products and services—feature, benefit, and value. On the steps of the stairs is the way it should be explained to the customer in terms of what it is, does, and means for the customer both for their project and them personally, when applicable. This will be discussed in more detail in the supporting section in Chapter 7 “Sales Call Skills.” Fig. 6.13 is an example of a value proposition written using the structure of the value stairs.

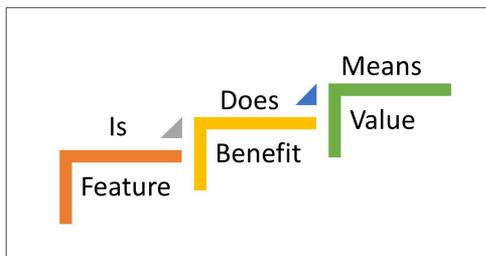


Fig. 6.12
The value stairs.

Proposal Components

There can be as few as one proposal components or as many as required. A good writing guide is to keep the proposal components linked to the customer's key needs and have no more than three to five components. There can be multiple elements to each component. The objective of writing your proposal this way is that it facilitates your conversation with the customer during the presentation.

It is important to remember that your objective is to convince the customer you have the best product or solution for their needs. As discussed in the communica-

tions chapter, the customer does not need to remember all the details, just that for the three to five proposal components they were convinced you had the best proposal for their needs. If they want the details that made up each proposal component, they can go back to the proposal.

In the table of contents section in Fig. 6.11, there are three proposal components. The first proposal component is presented as a question to the customer: “Why should customer choose supplier over a competitor?” The second proposal component is “The advantages for Customer using Supplier’s Advanced Technology,” and the third proposal component is “Competitive Pricing Proposal.” These were the three proposal components for this opportunity that the salesperson wanted the customer to remember after the presentation of his proposal. As you can see in the table of contents in Fig. 6.11, there are many more details for each component. This level of detail was added to the component because for this client these were all important factors for customers in the buying center who were going to make the buying decision. If you follow these guidelines you will win the opportunity and stay out of sales jail. See the “Staying out of Sales Jail” sidebar for some good sales tips.

There are many excellent books on writing powerful proposals. One of the best books on the topic is called *Powerful Proposals: How to Give Your Business the Winning Edge*.¹⁹ *Powerful Proposals* gives businesses proven strategies for creating customer-centered documents that outshine the competition. *Powerful Proposals* goes beyond “this is what we do” documents and takes the reader step by step through designing customer-focused proposals that highlight the firm’s tangible benefits to the client. This book contains invaluable information on creating effective executive summaries, writing themes, and generating the text, plus how to maximize graphics, call-outs, and other visual elements.

Applying the advice from the authors of *Powerful Proposals* to the Star Oil proposal for which the executive summary was shown in Fig. 6.13, the proposal

► **Stay Out of Sales Jail**

There are three sales laws that, when followed, will lead to sales call success. For each sales law, there is a specific sales tactic that is selected when setting your sales call objective.

Sales Call Law No. 1

People prefer to buy from friends rather than strangers.

Sales call tactic: Retrieve information about the company and person.

Sales Call Law No. 2

Understand before you sell.

Sales call tactic: Retrieve information about the project and specifically what it is the customer needs to ensure that their project objectives are achieved.

Sales Call Law No. 3

Talk to the customer about three things.

Short version

What is important to the customer.

What is important to the customer.

What is important to the customer.

Expanded version

What is important to the customer and why you are better than the competition.

Sales call tactic: Prove value

What is important to the customer and why you are the same as the competition.

Sales call tactic: Emphasize strengths

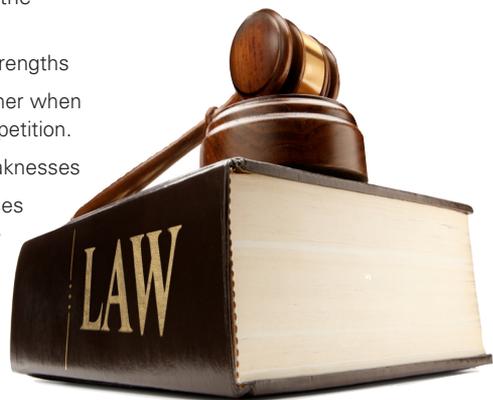
What is important to the customer when you are not better than the competition.

Sales call tactic: Minimize weaknesses

Ensure that every sales plan uses the above sales tactics for generally retrieving information in the early part of an opportunity. This is done by having conversations with people in the buying center using the project solution and request for

proposal worksheets. The next tactics are to prove value, emphasize strengths, and minimize weaknesses.

By following a plan constructed in this way when it comes time for the customer or buying center members to select their supplier, you will be insulated from the competition. This is very important because in most B2B large sales, when the purchase decision is made, you will not be in that meeting with the customer.





Star Oil Production Team

Your Production Team can achieve increased production rates of 20% from the Block M production wells by stimulating with Company's New System*. This estimate is based on calculations using Block M wells data and results from the current practice of using standard acid clean-up operations for Block M wells and from similar carbonate reservoirs in near by areas that switched to New System. A 20% increase in production will result in a return of \$2,037,158 for an investment of \$250,000 per well.

When Star Oil is prepared to stimulate the Block M production wells Company is ready to pump New System with 5-days notice.

Sales Engineer
Sales Engineer

Fig. 6.13
Executive summary written using value stairs model.

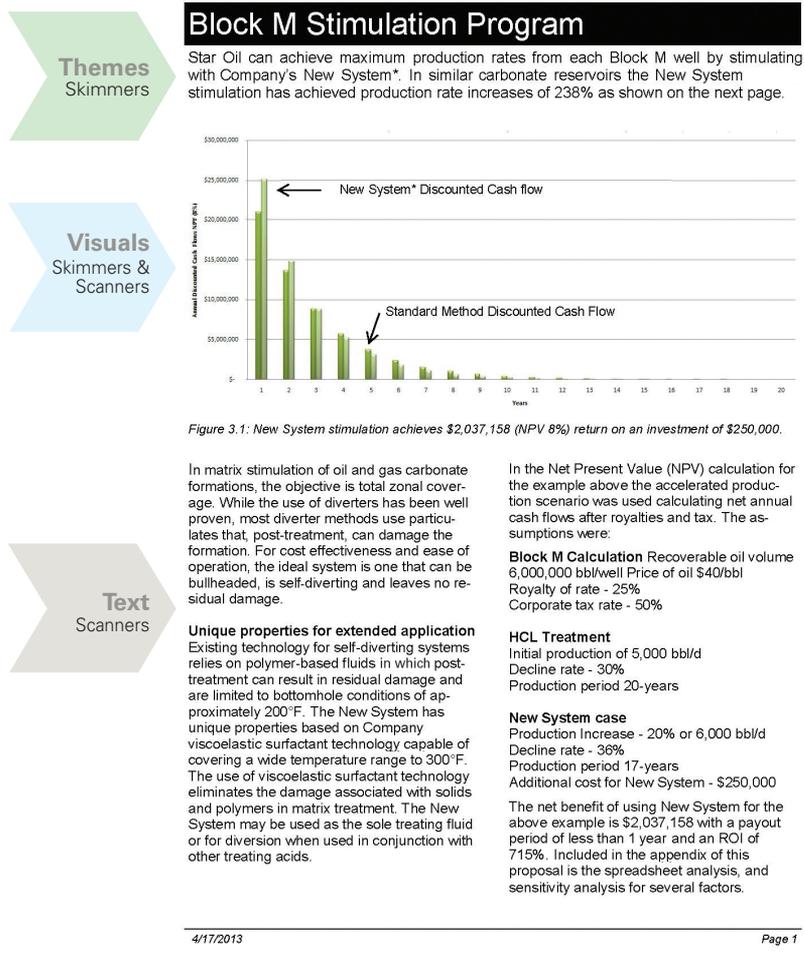


Fig. 6.14
Proposal component page following layout recommended in *Powerful Proposals*.

component for the “Block M Stimulation Program” is shown in **Fig. 6.14**. As discussed in the communication chapter, each person has their own communication style as influenced by their technology adoption, social style, learning channels and the buying factors such as their role, objectives, and concerns. To ensure that each page of your proposal is effective and appeals to as many customers as possible, each page should have a theme, visuals, and text. This layout will satisfy the way most people review information for the first time, such as when you are presenting your proposal. As described in *Powerful Proposals*, some people are skimmers. Skimmers will flip through a magazine to find what is interesting. Having themes accommodates this type of customer. Some people are scanners. Scanners want to see the details, like when you scan a page into text. Having text accommodates this type of customer. Visuals appeal to both. A best practice when adding captions for figures in a proposal is include the “what it means to the customer”.

The additional benefit of applying this writing style for responding to customers RFP's is it demonstrates compliance and responsiveness. As pointed out in *Powerful Proposals*, in the customer's first phase of evaluation, they are looking to eliminate non-compliant proposals. They do not want to waste their time evaluating proposals that are not compliant. This first review also affects their initial impression of how responsive the proposals are to their needs. Using themes that follow the customer's issues or requirements gives the proposal a more compliant appearance and the composition of the pages with themes, value propositions, visuals, and text make the proposal look responsive.

Another component of any page is white space. White space encourages and provides the customer with an area to make notes and add highlights as you present your proposal. It is a good practice when presenting your proposal to have a copy for yourself and each person you are talking to and encourage them to make notes on details specific for their purchase.

For smaller sales, when the salesperson is possibly qualifying and presenting a proposal in the same meeting, it is efficient to have a template with blanks for the customer to enter their specifics.

Step 4: Review and Rehearse

Review

The review at this stage is focused on proposal qualities. Before this review, the proposal must be edited, meaning the proposal has been checked for grammar and spelling and flow. The review of the proposal qualities include²⁰:

- **Compliance.** There are two compliance considerations. Customer compliant: Is the proposal structured according to solicitation proposal instructions, evaluation factors, and other solicitation requirements such as licences, permits, and résumés? Company compliant: Has the proposal been reviewed as per your company requirements, such as signing authority, terms and conditions, operational commitments, and pricing.
- **Completeness.** For small sales, after the request for proposal interviews are completed, the salesperson (as described in Step 2: Organize) should use one or several supporting worksheets to identify which requirements will be discussed in the proposal. In larger sales, where the customer has provided a specific format and content of proposals, then in the review the reviewer should check if all the proposal sections are completed as per the customer's instruction.

- **Responsiveness.** Does the proposal respond to the factors identified during the client interviews? Are the customer's objectives and critical success factors as they stated in the proposal? Does your proposal express your understanding of the prospect's situation and strategic drivers? For each expressed want and need, have you minimized any gaps between your offer and the ideal solution? Does the proposal give the impression that the customer's business is important to the salesperson?
- **Appearance.** Does the proposal look good? Do the proposal components have the same style and color palette? Is the text consistent in terms of the message being communicated? Are the discussions logical and flowing? When required, are there examples to clarify how topics being discussed will work or be applied in the customer's environment?
- **Win Themes.** How well does your proposal express your culture, relationship capabilities, and technical offering as a natural fit for this prospect and their requirements? Do the three to five key proposal components resonate and create confidence in you as a provider? Does the proposal sell the company's proposed features/solutions by turning them into customer benefits and clearly explain what this means for the customer in their situation? Does your proposal differentiate your company from its competitors for considerations that are important to the customer? Differentiators are features that matter to your prospect and cannot be matched by your competitors. Differentiators can be unique products and services that your company has or unique capabilities to deliver the required products and services the customer requires. In tight situations, the winning margin often comes down to small advantages in differentiation.

In this stage, someone should complete the review who:

- Is not directly involved in the opportunity. There have been many studies done that prove we cannot proof our own work. See the sidebar "Get a Second Opinion."
- Understands the customer's perspective and will read the proposal like a customer. In small sales the proposal will normally be reviewed by one person. If a team of people will be evaluating the proposal, have two people review: one person as the evaluator and the other as the decision-maker.

The reviewer or reviewers will give feedback to the salesperson or sales team on the strong parts of the proposal and areas that could be improved. The list below includes some of the more common issues that can be fixed if caught in time:

- Failure to focus on your client's business problems.
- No persuasive structure: information dump.
- No clear differentiation from your competitors.
- No compelling value proposition.
- Buried key points: no impact, no highlighting.
- Too hard to read: overuse of jargon, abbreviations, too technical.
- Customer-to-seller's name ratio is less than recommended 3:1.

In larger more formal tender submissions, customers will insist that suppliers accept their terms and conditions and the opportunity can have complicated requirements. For these types of tenders, there will be a separate discussion in Chapter 10 "Competitive Bidding."

► **Get a Second Opinion**

You have finally finished writing your proposal. You've sweated over your choice of words and agonized about the best way to arrange them to effectively get your point across. You comb for errors, and by the time you publish you are absolutely certain it is perfect. But, the first thing your customer notices isn't your carefully crafted message, it's the confusing word choice in the executive summary. You want to slide off the chair and hide. Before you present your proposal, get a second opinion. A reviewer might see something you missed during proofing.

The reason these problems get through isn't because we're stupid or careless, it's because what we're doing is actually very smart, explained psychologist Tom Stafford, who studies at the University of Sheffield in the UK. "When you're writing, you're trying to convey meaning. It's a very high level task," he said.²¹

As with all high level tasks, your brain generalizes simple component parts (like turning letters into words and words into sentences) so it can focus on more complex tasks (like combin-

ing sentences into complex ideas). "We don't catch every detail, we're not like computers or NSA databases," said Stafford. "Rather, we take in sensory information and combine it with what we expect, and we extract meaning." When we're proofreading



our own work, we know the meaning we want to convey. Because we expect that meaning to be there, it's easier for us to miss when parts (or all) of it are absent. The reason we don't see our own mistakes is because what we see on the screen is competing with the version that exists in our heads.

This can be something as trivial as transposing the letters in "the" to

"hte," or something as significant as omitting the core explanation of your article.

Generalization is the hallmark of all higher-level brain functions. We can become blind to details because our brain is operating on instinct. By the time you proofread your own work, your brain already knows the destination.

This explains why your readers are more likely to pick up on your errors. Even if you are using words and concepts that they are also familiar with, their brains are on this journey for the first time, so they are paying more attention to the details along the way and not anticipating the final destination.

When you're proofreading, you are trying to trick your brain into pretending that it's reading the thing for the first time. Stafford suggested that if you want to catch your own errors, you should try to make your work as unfamiliar as possible. Change the font or background color or print it out and edit by hand. "Once you've learned something in a particular way, it's hard to see the details without changing the visual form," he said.

Rehearse

There are two types of rehearsals:

- Presentations used when there will be a formal presentation of the proposal to the customer's team
- Role-plays used when the salesperson will reviewing the proposal with one or two people from the customer.

The salesperson should, whenever feasible, request to present their proposal in person and not simply send their proposal via e-mail or courier.

Professor Pentland of Living Labs at MIT conducted thousands of hours of studies examining how people communicate with one another. He published what he learned in an excellent book entitled *Honest Signals*.²² One conclusion was there is an unconscious communication channel between people that reveals itself through nonverbal signals. Because these honest signals happen mostly at the unconscious level, they are very hard to fake. The signals are tied to your biology and are very difficult to suppress. In one of his studies that consisted of MBA students presenting their business plans for funding from venture capitalist, one group saw the presentations and another only received the printed proposals. The group seeing both the presentations and proposals choose a completely different set of proposals than the group only receiving the printed proposals.

One significant conclusion from Professor Pentland's study was the way you deliver your message has a direct impact on the perceived content of the message. The implication for salespeople is you are part of your company's value proposition and, when presenting your proposals, let your commitment, enthusiasm, and belief in what you are offering help convince the customer that your proposal is the best.

As being in front of your customer is so important when presenting your proposal, being your best requires rehearsing. You want to rehearse the delivery of your proposal in order to ensure all the mechanics of the delivery are smooth so you can focus on delivering the proposal with the biggest emotional impact.

For both the presentation and informal rehearsals, the salesperson briefs the person playing the customer on how they expect them to react to the proposal and possible negative reactions to the proposal. The person playing the customer gives feedback after the rehearsal. If possible, the presentation or role-play should be recorded. You cannot lose by doing a rehearsal for several reasons:

- If the actual delivery of the proposal goes as you described for the rehearsal, it is an indicator you have a good understanding of the customer.
- If the real presentation does not go as you described, it is an indicator you do not have a good understanding of the customer and it is much better to know this so you can improve on future proposals.

During the rehearsals, will discover your strengths, gaps in the proposal information, and how well the proposal flows while you and/or your team respond to customer questions and objections during the presentation. This type of feedback is invaluable and cannot be discovered by only having someone reviewing your proposal.

Going through the review and rehearsal steps gives you the insights to correct or improve your proposal before you take it to the customer. In the sales world, it is about the small things that can make a big difference. See the sidebar "I'm Not a Loser!"

There is a lot of work to be done after a proposal has been presented, as described in Chapter 4 "Opportunities Management," particularly in terms of the resolution of concerns, negotiations, and monitoring stages. All these actions keep you close to your customer, enabling you to react quickly to developments that may prevent you from winning the deal. The final sales stage after the results are known is closed won or closed lost. Now the salesperson will start follow-up activities.

Follow-Up

Follow-up activities, as described in the opportunity management chapter, consist of actions taken during the later stages of:

- Outcome analysis
- Implementation
- Project review

The actions listed in the opportunities management chapter were for closed won opportunities. These actions ensure that, by following up, the salesperson and their team communicate that the customer's business is important, deliver on the promises, strengthen the relationship, build trust, and use this time to develop more business with the account.

► ***I'm Not a Loser!***

In my sales training seminars, I start off the seminar by first showing this flip chart to stress the point that in sales it's not okay to simply do a better proposal than your last proposal. It must be the best proposal for the customer. If it is not the best, it does not mean you are better or good: it means you are a loser. Some people, especially when they enter sales from a technical position, have come from a job where it is okay not to be the best provided you are trying to get better—and even if you are not trying to get better, as long as you are doing a good job that is acceptable.

In sales, good is not good enough.

In sales, the salesperson must realize that your com-



petitors' salespeople are talking with your customers every day and are trying to beat you—to make you a loser.

The second part of my introduction is to show the names of the people in the graphic and ask what these people do—are they politicians, golfers on the European tour, scientists, swimmers, or soldiers?

Very few people get the answer correct, but they do know Michael Phelps, the greatest swimmer of all time and the most decorated Olympian of all time. The names of the people on the list are swimmers Phelps beat. They all came in second. The biggest margin of victory in those victories was 0.025 seconds! In fact, in the 2008 Beijing Olympics, Phelps beat Cavic by .01 seconds to win his seventh gold medal and tie Mark Spitz's record.

The point is, in sales there is no silver or bronze medal. If you are not the

best, you are a loser. Phelps was the best, but that never stopped him from relentlessly training and trying to improve. He was not looking for big improvements; he just wanted to be the best he could be.

In sales, when you think you have a great proposal ready to go, jump back in the pool and review and rehearse your proposal and then do one more lap. Getting just a little bit better might bring you the gold!



In this section, four additional key areas will be discussed:

- Handling problems or customer dissatisfaction
- Initiating a difficult message
- Handling successes
- Outcome analysis customer debrief

Once the customer starts to purchase your products or services or enters into the implementation stage of the project, it is critical for the salesperson to be sensitive to how the project is going from the customer's perspective. This was described in Chapter 1 "Understanding the Role of Marketing and Sales" as selling by looking through the customer's window and not looking in a mirror. Once in the closed won sales stage, some projects will go as planned or even better; these make for great references. Some do not go as planned and can result in significant problems; these make for great references depending on how the problem is handled.

Handling problems and successes are key follow-up activities, and both are built around the key concepts of total quality management (TQM) and 6 Sigma and solid communication skills. The important factors are gather the facts, analyze, act, and report. The continuous improvement process applies for both problems and successes.

Handling Problems and Customer Dissatisfaction²³

When a customer raises a problem you were not prepared for or expecting:

- Encourage feedback from the customer, ask questions to understand, ask permission to take notes on key points, and mark points for clarification.
- Let the customer talk first and ask clarifying and confirming questions after the customer has finished. Try to develop a clear understanding of how the problem has impacted the customer, project, and company, if appropriate. When possible, ask for specifics about how this problem has affected them specifically, the project objectives, and the company.

- Be polite and sympathetic; show empathy with your words, body, and language, and lean toward the customer.
- Check with the customer for what they recommend for the next steps.
- Take ownership of trying to resolve the problems and communicate internally to the people who need to be involved from your company to deal with this issue.
- At this point it may be appropriate to take this information back to your office or discuss it with another person. If so, give the customer a time you will return to them with an update.
- Deal with complaints as quickly as possible and be available or arrange to have the best person available to discuss the problem with the customer in person, if feasible.
- Keep the customer aware of your progress and establish remedies for the problem.
- Address the underlying causes of the problems.
- Document the actions to be taken both to remedy the problem and to ensure that the problem will not happen in the future.
- Check for the customer's satisfaction.
- Thank the customer for taking the time to share and cooperate with you on this issue.

After Meetings—Relating to Handling Problems and Customer Dissatisfaction

- Follow up with a summary of the meeting that is suitable for distribution to the customer and internally and distribute it as soon as possible. Attach all correspondence to the company CRM system linked to the opportunity.
- Do not avoid the customer.
- Work to retain the relationship by making contact as soon as possible after the problem has been addressed. This contact is best if in person but can also be via e-mail, telephone, or social event. As required, fulfill expected servicing contacts.
- If appropriate, have your manager or other executive follow up with the customer management to acknowledge the situation and restate the importance of the customer's relationship.
- Be prepared to brief any other external customers who have contact with the customer.
- When the issue has been resolved, ask the customer for correspondence stating that the problem has been handled to their satisfaction. If the customer states they cannot, ask why. If the reason is due to unresolved issues, apply the problem-handling steps to resolve the open issues. If the customer states they do not want to for other reasons, ask if they can be a reference if other customers want to validate that the problem has been resolved.

Even though having a customer express their dissatisfaction is not pleasant, you want to ensure that you:

- Don't become defensive. When listening to the customer, listen, clarify, and confirm your understanding. In most cases, take the time to go back to your office and review the information with the other team members and determine what can be done.



- Don't pass the responsibility or cause of the problem to others. Use the skill of triangulation as discussed in the communications chapter.
- Don't make excuses. However, identify all contributing factors in your analysis and recommended actions.
- Don't accept abusive behavior or language from the customer. Tell them this is not constructive behavior and ask them to stop and continue on a more productive manner. If they do not stop, politely stop the meeting, tell the customer you will contact them later in the hopes that you can continue a more useful dialogue, and report the situation to your management.

If the customer does not accept your recommendation or solution, then handle it as a difference of opinion as discussed in Chapter 5 "Communication Skills." Be polite. Agree to disagree. Thank the customer for their time.

Initiating a Difficult Message

Sometimes you have to initiate a difficult message. This can be for such reasons as the project start-up has been delayed due to equipment or crews arriving late, equipment failure, or overdue invoices not being paid. When these types of situations happen, you need to take steps to inform the customer and correct the situation. In cases like these, before you engage with the customer, break the conversation into three parts: before, during, and after.

Before the Meeting

- Prepare. Be sure you have researched facts and options.
- Review the communication skills summary card.²⁴ The communication skills of constructive criticism will be used and, if needed, the skills of handling a difference of opinion and triangulation.
- Prepare the message considering the customer's social style. Review the "Managing Tensions" section in Chapter 3.
- Put yourself in the position of the customer. Identify the consequences, both positive and negative, to the customer whenever possible.

During the Meeting

- Open the meeting. Take time for pleasantries, rapport building, checking for how much time they can spend with you, and if there is anything they wanted to discuss while you're there. Then state the purpose of the meeting by positioning the message clearly, providing a rationale and a positive outcome. Be concise and carefully choose language not to incite. Do not state what you want the customer to do. That will be stated at the end of the discussion.
- Describe your preparation for this meeting and any efforts you have made on the customer's behalf.
- Avoid being defensive. Do not shift blame to the customer or someone in your organization. Use the skill of triangulation. Refer to the issue as "it."
- Explain the situation in a neutral tone.
- Explain your company's position and the reason why. Ensure that you stay committed and your support for your organization's position and express empathy for the customer's position.
- If the customer disagrees, then probe to understand why they have taken this position. If this is the situation, use the skill of handling a difference of opinion. Be prepared to offer and ask for alternatives or options to identify an alternative acceptable solution.

- If no alternatives or viable alternatives are identified, ask the customer to brainstorm, if appropriate.
- If a solution is agreed to, summarize the next steps.
- If no solution is agreed to, state your respect for the customer's position by acknowledging it and the reasons why, as stated by the customer. Then state you and your company's position and the reasons why as well as the next steps.
- Reconfirm and express empathy again for the customer's position.
- Ask the customer for their support and explain that you value the relationship.
- Ask if there is anything you can do for them to help close this issue, such as contacting any of their colleagues or management.
- Thank them for taking the time to discuss this issue.

After the Meeting

- Follow up with a summary of the meeting that is suitable for distribution to the customer and internally and distribute it as soon as possible. Attach to the company CRM system linked to the opportunity.
- Do not avoid the customer.
- Work to retain the relationship by making contact as soon as possible. This contact is best if in person but can also be via e-mail, telephone, or social event.
- If appropriate have your manager or other executive follow up with the customer's management to acknowledge the situation and the importance of the customer's relationship.
- Be prepared to brief any other external customers who have contact with the customer.
- The next opportunity you have to discuss the same situation, ensure that you use the skill of crediting as discussed in Chapter 5 to demonstrate your appreciation for their efforts and the benefits resulting from this.

Handling Successes

Handling successes is a very important aspect of continuous improvement. Companies wanting to achieve their best performance make analyzing failures and successes equally important. In a recent performance study, it was concluded that soldiers who discussed both successes and failures learned at a higher rate than soldiers who only discussed failures.²⁵ In another more recent research, it was shown that in fact neurons retain successes better than failures.²⁶ This has significant implications for salespeople and helps us understand the results in a separate study, which concluded that customers who experienced problems and successes remembered the successes better (detail and recall one month later) than the failures. However, what the salesperson needs to ensure is that, when you have a success or you and your team beat expectations, don't just brag about it. You have to take the same TQM and 6 Sigma approaches as when handling a problem and apply it to the success to ensure that you can make it happen again. If you do not take the time to demonstrate to the customer that you understand why the success happened, then the customer may just think you got lucky. See the **Chapter Highlight 6.4: "How Did You Know?"**

Chapter Highlight 6.4: "How Did You Know?"

In a sales training session on the Nile River in Cairo, the instructor's recommendation was to report successes and failures and you will have a more satisfied client.

The instructor had just described a study where, in the first control group, when the parent came home, the other parent only told about all the good things their son had done. In another group, the returning parent was only told all the bad things their son had done. In the third group, the returning parent was told both the good and bad things their son had done. The impressions of each group were as follows:

- First group: the other parent was hiding something
- Second group: their kid was a problem
- Third group: we have a pretty good kid

The instructor stated the conclusion: Report both successes and failures and the customer will be left with the impression that you are a good supplier. At that time, Ahmed (one of the students) raised his hand and said that he understood what the instructor was suggesting, but it just does not work like that in Egypt. The instructor was puzzled and suggested, jokingly, that maybe it was the pyramids that had an effect. After a few chuckles, the instructor asked Ahmed to explain.

Ahmed explained his company had, one month earlier, set a world record for running their tool for thirteen years non-stop, with no failures. So he had sent a flyer to his customers announcing the success. Then, just last week, the same type of tool failed after just two weeks. The operations team collected the equipment and other operating information and sent the machine back to the factory in Singapore for analysis and inspection. And after all that, Ahmed delivered a two inch binder full of analyses, findings, and recommendations to eliminate this type of failure. The instructor acknowledged Ahmed's information and asked, "And what is your point?"



Ahmed paused and said, "I was just notified over break that we lost. So you see, it just doesn't work that way here." The instructor then said, "Okay, let me confirm. You had a success and you sent a flyer." Ahmed said, "Yes." The instructor then stated, "Then you had a failure and took the equipment back, did the analyses and tests in Singapore, and gave the customer a two inch report." To add effect, the instructor picked up the seminar training textbook, which was almost two inches thick and quite heavy, and let the textbook drop and slam onto the desk. "And you gave that to the customer." Ahmed said, "Yes." The instructor said the customer stated, "You got lucky." Ahmed was startled and said, "How did you know?"

The instructor said "The flier is bragging. Why did you not send that equipment that set the world record back to the factory and gather all the operating statistics possible and make a similar report like the failure, identifying what were the critical success factors and recommendations to achieve a similar performance as the equipment had run for thirteen years? Had you done that, the customer would be excited about the prospect of having more of that level of performance."

The instructor then shared another incident from his experience in Indonesia. His operations team held monthly service quality review meetings with the customer. Normally, the topics of discussion were a review of the previous month's operations and what was coming up in the next thirty to sixty days and report on any failures and successes following the TQM process. In this particular meeting, and after reviewing the expected activity, the operations manager reviewed a failure, the outcome of the root-cause analysis, and recommendations to ensure that the failure would not happen again. Then in the same month of operations, there was a significant success where a new service was run successfully, saving the customer significant costs. This was of particular interest because in earlier attempts the new service was not successful. The operations manager went through the same type of review for the success and presented the root-cause analysis and recommendations to ensure that this type of performance could be counted on in the future. After the service

Chapter Highlight 6.4: "How Did You Know" (cont.)

quality review meeting over lunch, the only topic of discussion was how soon the new service could be introduced across the customer's operations. The instructor said, "While I was at lunch after the meeting, I was thinking if we had not discussed the success, most likely the customer's staff would have had reasons why they could not attend lunch."

The instructor then asked, "Who has heard of Babe Ruth?" Ahmed again put up his hand and said "He was the homerun king in the US in the 1920s." The instructor was impressed he had the era correct. "Yes, and did you know he was also the strike-out king of all time? Not many people remember that." The instructor then said to the class, "People remember the successes... if you tell them."

Ahmed said, nodding his head, "I get your point. I wish I had taken this training a year ago."



Customer Recognizes Success

When the customer recognizes a success, you:

- Encourage feedback from the customer, ask questions to understand, ask permission to take notes on key points, and mark points for clarification.
- Let the customer talk first and ask clarifying and confirming questions after the customer has finished. Try to understand how this impacts the customer and project- and company-level objectives and value drivers. When possible, ask for specifics of how this success has specifically affected them, the project objectives, and the company.
- Be excited about the success, show enthusiasm with your words, body, and language, and lean towards the customer.
- Check with the customer for what they recommend for next steps.
- Take ownership to ensure that an analysis of the success is done and document the success to understand the contributing factors and communicate this information internally to the people who need to be involved in your company to agree on the actions.
- At this point it may be appropriate to take this information back to your office or discuss it with another person; if so, give the customer a time you will return to them with an update.
- Deal with success as quickly as possible and be available or arrange to have the best person available to discuss the success with the customer in person, if feasible.
- Keep the customer aware of your progress as you discuss and establish next steps.
- Document the actions to be taken and capture the best practice that resulted in the success.
- Address any underlying issues associated with the success that could be improved.
- Check for the customer's satisfaction.
- Thank the customer for taking the time to share and cooperate with you on this issue.

Chapter Highlight 6.5: Perfect!



Plato is credited for saying “beauty is in the eye of the beholder.” Like beauty, success is subjective for the person looking at the performance. What you may consider standard or expected could make the customer ecstatic. Here is an excellent example from a quarterly service quality review meeting.

The operations manager had just presented a list of eight changes his crews had made, resulting in small efficiency improvements. When the eight items were looked at individually, none of the items alone would be significant; however, when added together, the eight items resulted in the customer being able to open an additional outlet in the same year. Rather than opening ten outlets as per the original plan, the customer was now able to open eleven in the same time-

frame. The customer’s reaction was, “That’s perfect. This is just what we need.” The customer’s delight was due to the fact that he had become very concerned that his company was not going to be able make the objective of ten outlets and now, with the efficiency improvements, he was confident eleven was achievable. He would have some very good news to report to his management.

What the customer did not know was that this list the operations manager presented at the service quality review meeting did not exist just two days earlier. What happened during the preparation for the meeting? The salesperson for the account went to the location and asked the operations staff to share some of their successes since the project started. The room was silent. The salesperson’s response was, “People, I know you are doing good things. There have not been any issues on this project. Tell me what improvements, big or small, have you made since you started.” The salesperson asked the room to split into two groups and brainstorm a list of improvements they had made and an estimated benefit to the client as a result.

After twenty minutes, the groups had come up with fifteen items that they then grouped into six categories. They discussed the list, eliminating several of the items, leaving eight items that had quantifiable efficiency gains and when added together were something the salesperson was excited to share with the customer. However, one project manager asked, “Why are we reporting this? This is what they pay us to do.” The salesperson’s reply was, “You’re correct—this is what they pay us to do, but it is not what they pay us for.” The project manager was now looking confused and asked, “What do you mean?” The salesperson said, “Our customer pays us for the products and services they require to build these outlets. There are a lot of companies that can provide this for them.”

“However, not every supplier is going to do what you have done. You are thinking about the customer’s objectives and trying to eliminate waste and improve efficiencies. The customer knows what they pay for, but not necessarily what they can do better because of our efforts. It is up to us to ensure that they know about our efforts that result in them being more successful. If we do not, and for the next project, the customer chooses a cheaper supplier for their products and services and they can only open ten or fewer outlets rather than eleven, they made a bad decision. And as far as I’m concerned, that would be our fault for not letting them know what we do for them. It is like knowing you have a supplier that is watching out for you. Not all suppliers will do that.”

This is a powerful example with two take-aways. First, you have to look for successes. Imagine a small child sitting in the back of a car going through the forest and seeing deer playing along the road. The child gets excited and asked her father, “Daddy, Daddy, do you see the deer?” The father, who is concentrating on driving the car, says, “No Sweetie, I don’t.” To which the child answers, “Daddy, you have to be looking to see them.” The same is true for successes: You have to make it a follow-up activity to be looking for successes.



Chapter Highlight 6.5: Perfect! (cont.)

Second, don't discount the small successes. As Robert Collier, a famous American, stated, "Success is the sum of small efforts—repeated day in and day out." A good way to find successes is to ask: Are there actions that your company has taken to enable the customer to:

- Improve operational efficiencies.
- Reduce risks and uncertainties.
- Make faster decisions.
- Reduce overall project costs.
- Earn a better return on investment.
- Increase more sales.
- Improve profitability.
- Improve logistics.
- Have access to limited resources or experts.
- Addressing customers-stated concerns and expectations.
- Achieving or beating stated objectives.
- Achieving customer objectives consistently.

The improvements in any of the above could be due to better supplier performance; new products or services; innovative processes; continuous improvement; better understanding of the customer's business goals and objectives; organization and processes; and transfers in staffing, with expertise in a given domain. Understanding what your company's contribution was to the better performance and knowing how to capture and report this to the customer are key actions in the follow-up activities for salespeople.

- As appropriate, ask the customer for a reference and release to use the reference with other customers as a demonstration of capabilities. Have an example or draft of what you would like the customer to provide.
- Follow up with a thank you note or small gift of appreciation, as appropriate, for sharing the success. Ensure that you use the skill of crediting, as discussed in Chapter 5 "Communications Skills."

Salesperson Recognizes Success

Before you initiate a discussion to confirm a success, you must first clearly define the success. This should be done as part of the process when discussing the customer's objectives, critical success factors, concerns, and expectations. These factors are captured during the qualification and sales call activities. In addition to these factors, once a project or sales is initiated, the customer may decide to purchase new products or services. For these sell-up sales, it is always important to understand what the customer will define as success as a result of buying new or additional products and services. There are also other scenarios that can be considered success; see **Chapter Highlight 6.5: Perfect!** for some other ideas for success. When you believe an event deserves being highlighted as a success, bring it to the customer's attention. In cases like these, before you engage with the customer, break the conversation into three parts: before, during, and after.

Before the Meeting

- Prepare. Be sure you have researched the facts and have completed the root-cause analysis for the success with the operations team and you have made an estimate to quantify the impact of the success.
- Prepare the report. Document the success and understand the contributing factors. Consider the customer's social style and the type of information they will need to validate the success.
- Determine what the best practice procedure will be to replicate the success again.
- Address any underlying issues associated with the success that could be improved.

During the Meeting

- Open the meeting. Take time for pleasantries, rapport building, checking for how much time they can spend with you, and if there is anything they wanted to discuss. Then state the purpose of the meeting by positioning the message clearly, providing a rationale and a positive outcome.
- Describe your preparation for this meeting and any efforts you have made on the customer's behalf.
- Let your enthusiasm show with your words, body, and language, leaning toward the customer.
- Review your report with the customer. Check often to ensure that the customer is in agreement.
- Check with the customer for what they recommend for the next steps.
- Take ownership to ensure that any follow-up activities are done and the people who need to be involved in your company agree on the actions.
- At this point it may be appropriate to take this information back to your office or discuss it with another person; if so, give the customer a time you will return to them with an update.
- As appropriate, ask the customer for a reference and release to use the reference with other customers as a demonstration of capabilities. Have an example or draft of what you would like the customer to provide.

After the Meeting

- Follow up with a summary of the meeting that is suitable for distribution to the customer and internally, and distribute it as soon as possible. Attach to the company CRM system linked to the opportunity.
- If appropriate, have your manager or other executive follow up with the customer management to acknowledge the success and then restate the importance of the customer's relationship and the opportunities to work collaboratively as in this success.
- Be prepared to brief any other external customers who have contact with the customer.
- Followup with a thank you note or small gift of appreciation, as appropriate, for sharing the success. Ensure that you use the skill of crediting as discussed in the communications chapter.

All the activities discussed up to this point in this chapter highlight two points:

- Focus on the customer after the sale.
- Employ excellent communication skills.

Without the focus on the customer and the ability to handle difficult conversations with the customer and to capture successes in a productive fashion, the salesperson's attention can all too often turn to the next sale. It is the follow-up activities that make for stronger relationships with the customer and provide the sales collateral to help make it easy for future customers to believe in your company's ability to deliver on your promises. The next follow-up activity is the outcome analysis customer debrief.

Outcome Analysis Customer Debrief

As described in Chapter 4 "Opportunities Management," the last stage of the procurement stage is outcome analysis. The outcome analysis customer debrief is done for all opportunities closed won, lost, and withdrawn. The outcome analysis customer debrief needs to be done as close to the customer decision and, if possible, with a minimum of two people in the buying center—ideally, the person who evaluated the proposals and the decision maker or other influential person in the buying center. The guidelines below are for each opportunity outcome won, lost, and withdrawn.

Closed Won Opportunity

- Express your excitement in winning their business and thank them for the award or order.
- Explain that the purpose of the interview is to learn as much as possible about the customer's perceptions and experience during the recent sales process so your organization can continually improve.
- Discuss confidentiality. State that you want to communicate feedback throughout your organization; if the customer/prospect feels there are certain aspects that are too sensitive, they should be identified during the conversation.

Feedback Regarding Your Proposal

Ask simple open questions regarding your proposal:

- Why did they make the award to you?
- What did they like best about your proposal?
- What could have been improved?
- Was there anything additional they would have liked to include?
- Do they have any recommendations for the next opportunity?
- Now that they have made the award, do they have any concerns or expectations?

Product- and Service-Specific Feedback

Ask more specific questions, if not answered previously by the customer:

- Overall, what do they think of your products or services?
- How well did your product capabilities meet their expectations?
- How would they characterize the completeness of your portfolio?
- Who were you competing against?
- How did you stack up against the competition?
- What did the customer view as your strengths and weaknesses?
- What did the customer view as your competitors' strengths and weaknesses?

Marketing

- What marketing messages resonated during the buying process?
- What marketing tools were most effective?
- Are there marketing tools that they would recommend be made available (web, social media, etc.)?

Sales Effort

- Did you focus and identify all their needs?
- How well did you explain your solution for their environment?
- Were all their questions or concerns addressed in the proposal?
- Is there anyone else they would like to talk with now?

Decision-Making

- Who was involved in the decision-making process?
- What was the primary driver in their decision?
- What were the contributing factors?
- Was there a model?
- What did they evaluate as the costs of your offer?
- Did they contact your references? If so, were they helpful?

About the Company

- What was the customer's perception of your organization before entering the buying cycle?
- Did their perception change?
- If so, how did it change?
- Were they aware of the company's roadmap and future product and service strategies?
- Did the company's future direction factor into their decision?

Open Feedback

- Does the customer have any additional comments or suggestions?
- Do they know of anyone else who has similar types of projects or needs they recommend you contact and could they give you an introduction?

After the Debrief

- Send a thank you note to the customer for taking the time to debrief with you.
- Have your manager or executive send a thank you note or make a telephone call to their executive thanking them for the opportunity and stating that your company is looking forward to working with them.
- Summarize in writing the notes from the interview and distribute them to appropriate internal personnel.
- Conduct a debriefing meeting internally and list any action items that came out of the meeting.

Some of the information above should have been discussed during the qualification and sales call activities, such feedback regarding your products and services and the decision-making process. However, that was before the customer had offers from the competition. It is good to compare the feedback you had before and after as this will indicate if there were any misunderstandings and how good of a job the competition did selling against you.

Closed Lost Opportunity

- Express your disappointment in not winning their business and how you really believed what you had submitted a winning proposal.
- Explain that the purpose of the interview is to learn as much as possible about the customer's or prospect's perceptions and experience during the recent sales process so your organization can continually improve.
- Discuss confidentiality. State that you want to communicate feedback throughout your organization; if the customer/prospect feels there are certain aspects that are too sensitive, they should be identified during the conversation.

Feedback Regarding Your Proposal

Ask simple open questions regarding your proposal:

- What did they like best about your proposal?
- What could have been improved?
- Was there anything they would have like to include?
- Any recommendations for the next opportunity?
- Now that they have made the award, do they have any concerns or expectations?

Product- and Service-Specific Feedback

Ask more specific questions if not answered previously by the customer:

- Overall, what do they think of your products or services?
- How well did your product capabilities meet their expectations?
- How would they characterize the completeness of your portfolio?
- What did the customer/prospect view as your strengths and weaknesses?
- What did the customer/prospect view as your competitors' strengths and weaknesses?

Marketing

- What marketing messages resonated during the buying process?
- What marketing tools were most effective?
- Are there marketing tools that they would recommend be made available (web, social media, etc.)?

Sales Effort

- Did the you focus and identify all their needs?
- How well did you explain your solution in their environment?
- Were all their questions answered?
- Is there anyone else they would like to talk with now?

Decision-Making

- What was the primary driver in their decision?
- What were the contributing factors?

About the Company

- What was the customer's perception of your organization before entering the buying cycle?
- Did their perception change?
- If so, how did it change?
- Are they aware of the company's roadmap and future product and service strategies?

Open Feedback

- Does the customer have any additional comments or suggestions?
- When will they next be making a purchase? Would it be ok for you to contact them for that opportunity?
- A best practice is to agree with the customer that you will contact them in three to six months unless they need to contact you before that. This can be via e-mail, telephone, social media, or in person.
- Do they know of anyone else who has similar types of projects or needs they recommend and could they give you an introduction?

After the Debrief

- Send a thank you note to the customer for taking the time to debrief with you.
- Ensure that they are on your contact list for future marketing campaigns.
- Summarize in writing the notes from the interview and distribute them to appropriate internal personnel.
- Conduct an internal debriefing meeting internally and list any action items that came out of the meeting.
- Have your manager or executive send a thank you note or telephone call to their executive thanking them for their team's time and disappointment in not winning their business. Let the customer executive know the sales team will do an review of the feedback from their team and your company is looking forward to having an opportunity to work with them in the future.

Closed Withdrawn Opportunity

Express your disappointment regarding the opportunity being canceled. If the opportunity was canceled after submitting your proposal and the customer evaluated it, follow the same debriefing as for a closed lost opportunity. Ask for more details to understand why the project was canceled and if there is a possibility the project or purchase could be done at a later date. If the customer did evaluate, ask them who would have won the opportunity.

If the opportunity was withdrawn before you submitted your proposal, you should still debrief the customer on the following topics, as appropriate.

- Explain that the purpose of the interview is to learn as much as possible about the customer's or prospect's perceptions and experience during the recent sales process so your organization can continually improve.

Feedback Regarding the Future Submission of a Proposal

Ask simple open questions regarding what they want to see in future proposals:

- What do they look for in a proposal?
- What are common aspects of proposals they think can be improved?
- Do they have any recommendations for the next opportunity?
- What are their concerns or expectations when evaluating proposals?

Product- and Service- Specific Feedback

Ask more specific questions if not answered previously by the customer:

- Overall, what do they think of your products or services?
- How well did your product capabilities meet their expectations?
- How would they characterize the completeness of your portfolio?
- What did the customer/prospect view as your strengths and weaknesses?
- What did the customer/prospect view as your competitors' strengths and weaknesses?

Marketing

- What marketing messages resonated during the buying process?
- What marketing tools were most effective?
- Are there marketing tools that they would recommend be made available (web, social media, etc.)?

Sales Effort

- Did you focus and identify all their needs?
- How well did you explain your solution in their environment?
- Was there anyone else they would like to talk with now?

Decision-Making

- What was the primary driver in their decision for canceling the project?
- What were the contributing factors?

About the Company

- What was the customer's/prospect's perception of your organization before entering the buying cycle?
- Did the perception change?
- If so, how did it change?
- Did future directions factor into your decision?
- Were you aware of the company's roadmap and future product and service strategies?

Open Feedback

- Does the customer have any additional comments or suggestions?

After the Debrief

- Do they know of anyone else who has similar types of project or needs they recommend and could they give you an introduction?
- When is the next time they will be purchasing and would be okay for you to contact them for that opportunity?
- Send a thank you note to the customer/prospect for taking the time to debrief with you.
- Ensure that they are on your contact list for future marketing campaigns.
- Summarize in writing the notes from the interview and distribute them to appropriate internal personnel.
- Conduct the debriefing meeting and list any action items that came out of the meeting.
- Have your manager or executive send a thank you note to their executive thanking them for their time and expressing disappointment that the opportunity was canceled. Also state that your company is looking forward to having an opportunity to work with them in the future.

This concludes the discussion on the sales activities. All the activities are scalable and should be adopted to fit the sales environment of the salesperson. The sales activities need to be adjusted to fit the salesperson's assignments. For example, a salesperson who has been assigned a new territory will need to dedicate more of their time to prospecting initially and, as they secure more business, their time will be divided more evenly among all the sales activities. A salesperson who is assigned one or two accounts or a large account with ongoing business will do less prospecting and spend more time building relationships and conducting sales meetings, proposals, and follow-up.

Conversations and meetings with customers are a reality of the sales profession. All the sales activities require that the salesperson have conversations and meetings with the customers. This contact can be in person, via telephone, or via e-mail. It is essential that the salesperson be very good at having successful conversations and meetings with their customers. The skills for successful sales-related conversations and meetings are called sales call skills and are based on the needs-satisfaction process discussed earlier in this chapter. The next chapter will discuss in detail the sales call skills and tools for having successful sales-related conversations and meetings.



Summary of Chapter Objectives

1. Make relationship building a specific and continuous process.

Relationship building is about making a positive impact on the level of trustworthiness between you and your customers and prospects. The more trustworthy you are, the easier it is to be successful with your clients and make your sales objectives. There are many possible opportunities for a salesperson to build trust with their customers. Different situations can be used to strengthen or improve the customer's perceptions of your credibility, believe what you say, build reliability, have confidence in your ability to deliver on specifics and results especially for promises made during the pursuit of an opportunity, create intimate and comfortable feelings with you, and orient your customer so they know that you have considered their best interests and objectives before you try selling to them.

2. Understand the key sales activities to manage a sales pipeline.

To maximize the value of a pipeline, the salesperson must proactively manage the pipeline. The active management of a pipeline starts first with new opportunities being continuously added to ensure that there is a continuous revenue stream, with new sales replacing opportunities that are closed. Leads that have been qualified become either confirmed leads or closed withdrawn. A confirmed lead passes the qualification questions in the opportunity assessment for **“Is there an opportunity?”** and it is confirmed that the customer will make a purchase of the products and services you provide. A closed withdrawn lead is something that does not pass the assessment questions and will not result in the customer spending money to purchase the products and services from your company. In the opportunity management process, the qualification activities occur during the identification of the compelling event. The main tool for holding the customer qualification conversation is the Customer Project Solution Worksheet.

Once an opportunity is in the confirmed lead sales stage, the salesperson uses sales meeting activities to learn more about the customer's needs from different people in the buying center by completing the assessment questions for “Can We Compete” (do you have a technically acceptable offering), “Can We Win” (do you have enough people in the buying center who want you to win) and **“Is it worth winning?”** (financial and strategic questions). At this point, the salesperson will select their competitive sales strategy and ask the fifth question of the opportunity assessment: What are they and the sales team going to do next? At this time, the salesperson will have their strategy reviewed and set the sales stage to closed withdrawn if the assessment questions indicate there is no real opportunity. In the sales opportunity-disengage stage, the sales team is not going to pursue the opportunity and will let the competition win the opportunity for a number of reasons. The sales opportunity-attack stage includes four competitive sales strategies of frontal, flanking, defend, or fragment. The competitive sales strategy selected will guide the salesperson on what they will do going forward to win this opportunity. The other option the salesperson can choose for the sales stage is sales opportunity-develop. In this sales stage, the opportunity will not be closed in a calendar year, but the sales team will stay engaged with the customer to better improve their chances of winning the opportunity in the future. The opportunity management process stage evaluation provides a significant level of detail and the tools used during confirmed lead and sales opportunity stages. Later in the textbook, there is a dedicated chapter focusing on deciding and creating a strategic sales plan built to execute a competitive sales strategy. The strategic sales plan review process is also described at the end of that chapter.

The next key sales stage is bid/proposal, which is when the salesperson will present their proposals; in larger more formal opportunities following a customer's tendering process, the bid/proposal sales stage is set once the RFP is received. The key sales activity in this stage is present proposals. A proposal is not a quote. A proposal is a sales document that is a tool for both the salesperson and supporters inside the customer's buying center. The opportunity management process is a very important resource for the salesperson during this stage. Later in the textbook for formal tendering processes, there are three chapters dedicated to these activities: bid evaluation, pricing, and negotiations.

Once the outcome is known and the winner is announced, the sales stage is set to closed won, closed lost, or closed withdrawn.

3. Choose which components of prospecting to include in your prospecting plan.

Many people have a negative perception of prospecting, mostly due to using prospecting incorrectly. By understanding the purpose of prospecting and how to create a buying environment for your customers, prospecting becomes rewarding by creating opportunities to talk to many new potential customers. Prospecting involves finding the customers in your

target markets or accounts that can benefit from your products and services. The objective of prospecting is to have the customer agree to talk to you about their business. Too many salespeople try to take shortcuts and try to sell while prospecting, which is not effective. An effective prospecting plan has a variety of components used together to keep a continuous source of leads flowing into your pipeline. The prospecting components are: corporate marketing communications Plan (MCP), research, current accounts, referrals, references, networking, conferences, cold calling, e-mail marketing, and tracking. Prospecting should include each of these components, with the amount of time and frequency allocated to each dependent on the salesperson's area of responsibility territory versus account assignments and the level of brand recognition the salesperson's company has in their marketplace and their position compared to their competitors.

4. Apply a structured approach for building proposals.

The proposal is a tool to convince the customer you have the best option for them. The creation of the proposal starts with the early research completed as part of the prospecting stage and the information collected during the sales meetings earlier in the sales activities. This information is then classified as to the important points that must be discussed in the proposal, organized into three to five proposal components, each with a well-defined and written value proposition that explains to the customer what you will provide as part of your proposal, what the features and benefits do for the customer, and what this means for the customer for their specific application. Many people from the buying center can use your proposal to make their decision. To ensure that your proposal appeals to as many people as possible, the proposal must be written with pages consisting of themes (headings and value propositions), visuals (graphics), and text (details). The opportunity management process procurement stages identify all the critical customer milestones that a proposal must go through before being selected.

5. Know how to manage key follow-up activities.

For each of the outcomes there are specific follow-up activities that need to be done, including debriefing with the customer tailored for each outcome and the other activities as described in the opportunity management process. In addition, there are three activities the salesperson must be very good at to be successful at managing the follow-up activities: handling customer problems or dissatisfaction, initiating a difficult message, and handling successes. The salesperson's ability to handle these different customer scenarios will have a direct impact on the customer's perception of how well and what level of service they received from their supplier. The opportunity management process stages included in the follow-up activities are outcome analysis, implementation, and project review. Each of these stages has several additional activities the sales team should complete as part of the follow-up activities.

Most of the activities a salesperson will spend their time on involves sales-related conversations with the customer following a consultative selling approach using the need satisfaction process. The consultative selling approach is made up of all the factors discussed and recommended in the textbook up to this point, and the approach will continue to be followed for the remaining sections, with added emphasis during the bidding and negotiations. The needs-satisfaction process at the heart of the consultative selling approach includes the most critical selling skills: sales call skills and handling customer negative reactions. These skills will be presented in detail in the next two chapters.



Applying the Concepts

1. List your top five opportunities you are working on now down the left side of an Excel worksheet, as shown below. Identify the sales stage for each opportunity, your last contact date and objective (what you wanted the customer to agree to at the end of the meeting), and when your next contact is planned for and the objective of the meeting. The purpose of this exercise is to have you think about your activities and apply the terminology used in the chapter. This is also a very basic pipeline.

	A	B	C	D	E	F	G	H	I
1	Opportunity Name and ID	Sales Stage	Last Contact Date	Activity	Objective	Planned Contact Date	Activity	Objective	
	Star Oil New Installation X09-TGE	Confirmed Lead	May 6	Sales Meeting	Have our company included on bidder's list	May 30	Sales Meeting	Key people from customer's buying center to visit our base emphasize what this means to the customer. Have customer agree the local facilities are a factor that should be considered in their evaluation model.	
2	Shell Single Well Perforating Proposal	Sales Opportunity - Frontal	May 7	Sales Meeting	Support customer's need of deep penetrating through tubing perforating system. Have customer acknowledge what this would mean for them on their project.	Jun 1	Present proposal	Have customer award perforating to us.	
3									
4									
5									
6									

2. From the list of prospecting components below, how many of these are you doing now and, if you are not doing them now, what could you do for this component? Refer back to the prospecting section of this chapter for a description of each.
 - Corporate Marketing Communications Plan (MCP)
 - Research
 - Current Accounts
 - Referrals
 - References
 - Networking
 - Conferences
 - Cold Calling
 - E-mail Marketing
 - Tracking
3. From the customers you know, pick which customer would rate you highest (on a scale of 1 to 10, where 1 is low or bad and 10 is high or excellent) for credibility, reliability, and intimacy. What did you do to deserve that rating? Considering self-orientation, where 1 is great and 10 is very bad (you only think of yourself), which customer would give you the best self-orientation rating and why? Once this is done, think of your customer base again and which customers would rate you the lowest on each factor and why. An example is shown on the next page. Can you think of some things you can do to improve the relationship with the people in your worst list? Of the trust factors overall, which do you think is your strongest and weakest? Can you think of how you can leverage your strengths and address your weaknesses?

Factor	Best	Rating	Why
Credibility	Thomas	7	Co-authored SPE paper.
Reliability	Sargjini	8	Last project everything went like clockwork.
Intimacy	Michelle	7	Have played squash a lot and have gone to dinner with spouses.
Self-orientation	Yingtai	3	Let Yingtai present the paper at SPE even though I did most of the work.

Factor	Worst	Rating	Why
Credibility	Ben	3	Could not deliver on promise made on new technology on last project.
Reliability	Artur	3	Missed our last two planning sessions for community football team.
Intimacy	Ahmed	3	New engineer for custom drilling team arrived 6 months ago and we have not met.
Self-orientation	Gulzel	8	Current project: she believes I was not clear about charges for equipment ordered but not used.

- Following the format for a proposal component page, as shown in Fig. 6.13, think about an upcoming proposal you will present and make a rough draft of your page. Include a theme (heading), a value proposition under the heading, a graphic with the caption stating what this means for the customer, and what would be in your text for a more detailed explanation.
- Follow-up activities: Make a list showing your last follow-up activity. Now knowing what you know about how to complete the activity, would you have done anything differently? What would you add to the list of actions based on your personal best practice?

Activity	What would you do differently?	Add—based on your best practice
A. Outcome Analysis Customer Debrief		
B. Handling Problems or Dissatisfaction		
C. Initiating a Difficult Message		
D. Handling Success Customer Recognized		
E. Handling Success Salesperson Recognized		



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