

# Cross-Selling

## eWORKBOOK



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# Cross-Selling

Selling today has evolved from a transactional, one-shot sale mentality to building lifetime customer relationships; from persuading and telling to problem solving and helping; from low-price selling to value-added selling.

Cross-selling is not just pushing more products. It's encouraging customers to buy other products that meet their needs. Being an effective cross-seller seems to be an elusive practice that is sought by many but obtained by few. Nearly every business speaks of the importance of cross-selling its full range of products and services to customers. Yet very few firms achieve it in practice, because they assume that people know what they want.

Most people equate cross-selling with a salesperson selling additional products to current customers. It can also be defined as using some existing customers, who I call Apostles, to sell to current customers and prospects. What?! Customers cross-selling? Yes, customers can also cross-sell.

Now, I'm sure you're familiar with the idea of cross-selling, but are you aware of all the benefits?

Cross-selling is one of the least risky and most profitable actions you and your company can take. In any industry, revenue can and will be increased dramatically with the number of additional products sold.

Anyone who has ever been on the front lines of business development knows that new customer acquisition is much more costly and time-consuming than revenue and market growth through up-selling and cross-selling to existing customers. Studies have found that it's at least four times more expensive to try to sell products and services to new customers than existing customers. Wells Fargo conducted its own study on this topic and found that it was ten times more expensive.

Cross-selling creates more customer retention, or "stickability." It's designed to widen the customers' reliance on

the company and decrease the likelihood that they would switch to a competitor. Customer loyalty is a cornerstone of business growth and repeatable revenue streams. This loyalty is driven by predictability in the performance and service levels they receive from the companies that get their hard-earned dollars.

Most customers prefer a different array of products and services and often appreciate the convenience that is provided through a comprehensive and beneficial cross-selling approach. Consider that the more services a customer buys from a company, the more likely that customer will be to stay with the company, often for life.

Lastly, cross-selling is a tremendous vehicle for accelerating growth. It can ensure a greater predictability of revenues and is also a cost-effective way to grow your business.

When effectively planned and executed, cross-selling can transform your bottom line. And that's the bottom line! The following workbook will not only help you understand the reasons and whys for cross-selling, but the effective and successful strategies and tactics to build your own cross-selling process.

## Introduction Follow-Up Questions

- 1.** Selling today has evolved from a transactional, one-shot sale mentality to:
  - A. building lifetime customer relationships.
  - B. low-price selling.
  - C. unloading products.
  - D. close! close! close!
- 2.** Cross-selling creates more customer:
  - A. retention.
  - B. irritability.
  - C. turnover.
  - D. understanding.
- 3.** Cross-selling is \_\_\_\_\_ way to grow your business.
  - A. a cost-effective
  - B. the only
  - C. a pricey
  - D. a complex

**4.** Carefully thought out and executed, cross-selling can \_\_\_\_\_ your bottom line.

- A. transform
- B. lower
- C. illuminate
- D. weaken

## Customer Satisfaction

Your customer is your responsibility. Your goal is to guarantee their satisfaction. Customers gravitate to the companies that provide superior service. Cross-selling is not selling in the classic sense of the word; it's essentially the way you take care of your customers. You are your customer's tour guide through your business, and everything you do and say will help to set up cross-selling opportunities that benefit the customer and your company.

Customer satisfaction most strongly affects a customer's willingness to purchase additional products or services. Think about that. If a customer is unhappy with their purchasing experience, why would they want to buy more from you?

You must exceed customer expectations with their current purchase before cross-selling additional products.

**First, identify each customer's success criteria.**

What can you do to meet or exceed each customer's satisfaction? How will every one of your customers judge the success of your product or service, you and your company's responsiveness, and your after-sale service three, six, or twelve months after their purchase? Try to determine the specific criteria the customer will use to determine whether or not you fell short of, met, or exceeded their expectations.

**Next, rectify unrealistic expectations.** If they are requesting something that cannot be done or accomplished, let them know, and bring their expectations back to reality - what can actually be expected with a little bit of "stretch" on your part.

**Then, verify customer satisfaction.** Here is where you want to continually inspect what they expect.

**Monitor, on an ongoing basis, how well you are meeting or exceeding their expectations.** It's much easier, faster, and less expensive to correct problems when you discover them sooner rather than later. I liken this step to a "progress report" students get in school prior to receiving a report card. It gives you the opportunity to correct things before the final evaluation takes place.

When you know that the customer is satisfied, explore their need for additional products or services. Customers will be open to your additional product or service solutions if they are first satisfied with the results they received from their previous purchase.

Make sure your suggestions come up at the appropriate time. Depending on the product or service, cross-selling can happen at different times. If you are selling a pair of pants, you would recommend a shirt just before they try them on. If you're selling a large appliance, you would recommend the extended warranty once the buying decision has been made. If you're opening a checking account for a new client, maybe a savings account, debit card, or overdraft protection would be a natural cross-sale.

When dealing with a customer, just remember this: Every satisfied customer is a potential repeat customer and a potential "Apostle" who might help you cross-sell to other prospects.

## Customer Satisfaction Follow-Up Questions

**5.** Your goal as a salesperson is to:

- A. guarantee the customer's satisfaction.
- B. cross-sell all your products to all your customers.
- C. sell all your prospects.
- D. make friends with all your customers.

**6.** You must \_\_\_\_\_ with a customer's current purchase before cross-selling additional products.

- A. follow up
- B. be finished
- C. exceed customer expectations
- D. recover from

**7.** When you know that the customer is satisfied:

- A. explore their need for additional products or services.
- B. close the sale.

- C. start telling them about all your products.
- D. hand them off to your manager.

**8.** Every satisfied customer is:

- A. another possible customer service headache.
- B. one step closer to winning a sales contest.
- C. a potential repeat customer.
- D. None of the above

## Focus on Customer Needs

When cross-selling, you're not pushing a product; you're providing solutions to customers' needs. You are matching your products or services to their needs.

Finding out what customers want isn't always as simple as it seems. You have to know how to ask the right questions to uncover needs for your products and services. The questions on the following page work for individuals or companies, existing customers or potential customers, no matter what it is you're selling. Reword them, as you see fit, to suit your customers - for instance, whether or not you're selling to an individual, group, or business.

You should also be aware of customer comments that might indicate the need for one of your products or services. For instance, a client might say in a conversation with a mortgage broker, "I'd love to get access to some of the equity in my home, but there's no way I'd refinance now, with the amount of closing costs and points." This might indicate to the mortgage broker that the client needs an equity line of credit that has low or no closing costs and only incurs interest costs when the client taps the line of credit.

Another example is an insurance agent talking with clients about renewing their auto policy. The clients say, "We've been real busy lately. We have a house in escrow." This is a great opportunity to sell them homeowner's insurance and tell them about the discount they can get by using the same company for both auto and homeowner's policies. Or they say, "Our sixteen-year-old son received straight As this semester." The agent should talk to them about getting an auto policy for their son, about the honor roll discount, or a driving lessons discount. The agent could also talk to them about purchasing an umbrella liability policy.

Here's another example: The customer of a bank says, "I'm frustrated because I just lost my bookkeeper. Now I have to do payroll." That might indicate to the banker the need for the bank's payroll processing service. One last example: A car buyer at a dealership casually mentions to his or her spouse how they always get lost driving in their new town. This might indicate to the car salesperson a need for a GPS system for their current or new car.

Regardless of your industry or your products or services, be very aware of the things customers say that might indicate a need for one of your products or services.

Also, train your staff to recognize these buying signals even during normal telephone calls with customers and to pass along any such information they learn to those in charge of sales within your company. To really get support staff to listen and look for cross-selling opportunities with your customers, consider paying them a bonus every time one of their leads turns into a sale.

Taking good notes, either during a meeting or immediately afterward, can help you evaluate and remember a customer's needs. Carefully gathered and organized customer information can help your whole team follow up on sales opportunities at the right time.

There are two types of customer needs that you need to be familiar with: macro customer needs and micro customer needs.

**Macro customer needs** are the typical needs for a group of people. These people could be physicians, contractors, artists, etc. Each group might very well have different needs.

**Micro customer needs** are the typical needs for a buyer within a group. For example, a particular doctor, contractor, or artist. Each individual may very well have unique needs.

You cannot know what any customer needs if you're determined to "push" a certain product or service on them without carefully evaluating their particular desires. Ask the right questions to uncover customer needs or listen to their buying signals so you suggest only the right products or services at the right time to the right customers.

When you focus on customer needs, you're viewed as a helper - a consultant - rather than simply a fast talking "pusher" of products.

## **Sample List of Questions to Uncover Customer Needs**

What are your long-term goals?

How much and how often do you buy?

What are your product specs and success criteria?

Where would you put your buying emphasis regarding price, quality, and service?

What do you like best about your present supplier?

What do you like least about your present supplier?

What might cause you to change suppliers?

How do you perceive my company and our products/services?

What did we do in the last sale that impressed you most?

Who was the best salesperson you have worked with and why?

Besides yourself, who else will be involved in the decision-making process?

What will it take for us to do business?

If you were me, how would you proceed?

Who else do you know who might have a similar need for my product/service?

What else can I do for you?



## Focus on Customer Needs Follow-Up Questions

- 9.** When you are cross-selling, you are NOT:
- A. pushing products.
  - B. providing solutions.
  - C. matching products with needs.
  - D. selling.
- 10.** You have to know how to \_\_\_\_\_ to uncover needs for your products and services.
- A. ask the right questions
  - B. illuminate
  - C. prospect
  - D. None of the above
- 11.** You must be aware of customer \_\_\_\_\_ that might indicate the need for one of your products or services.
- A. comments
  - B. complaints
  - C. moments of misery
  - D. lack of communication
- 12.** To really get support staff to listen and look for cross-selling opportunities with your customers:
- A. consider paying them a bonus every time one of their leads turns into a sale.
  - B. have them listen in on a manager's phone calls with customers.
  - C. write a script of possible complaints.
  - D. make sure they attend company orientation programs.
- 13.** What can help you evaluate and remember customer needs?
- A. Taking good notes
  - B. Asking for referrals
  - C. Body language
  - D. Having another salesperson with you
- 14.** Which customer needs are typical for a group of people?
- A. Macro
  - B. Micro
  - C. Universal
  - D. Individual

- 15.** When you focus on customer needs, you are viewed as:
- A. a helper.
  - B. a product pusher.
  - C. annoying.
  - D. a good sales closer.

## One Need at a Time

When you're with a customer, it's important to meet one need at a time. If they are forced to make too many decisions at one time, it will only confuse them. I used to have an online assessment that asked customers which they would choose from:

"A"

"A" and "B"

"A," "B," and "C"

Not a tough question, but only one percent of my customers made a decision and purchased one of the three options I gave them. I decided to change it to this:

Here's "A," "B," and "C".

Would you buy it? Yes or no?

Five percent made a decision to purchase. That means revenue went up over five hundred percent. With the single choice, everyone chose the most expensive option as opposed to the two less expensive options when they had three simple choices.

Don't overload your customer with too many buying decisions at one time. If your attempts to cross-sell are not closely related to the original purchase, the customer is less likely to take it. I can't stress enough how important it is to make sure you suggest additional products at the appropriate time.

Of course, there are times when you should cross-sell related items at the same time. In a clothing store, when a man buys a suit, you can cross-sell a shirt, tie, belt, socks, and shoes to create a complete outfit. When a woman buys a dress, you can cross-sell a purse and shoes to match. When someone opens a checking account, you can cross-sell a savings account, overdraft checking protection, or a debit card tied to the checking account. When someone buys a computer, you can cross-sell a printer or WiFi Internet access. When someone orders a hamburger, you can cross-sell fries. I think you get the point.

When I suggest *not* asking the buyer to make too many decisions at once, I'm referring to *not* discussing a mortgage 6

refinance when someone opens a checking account *unless* the need for such a service has been indicated by the customer and only *after* the checking account has been opened. Complete the first transaction before discussing the second transaction.

## One Need at a Time Follow-Up Questions

**16.** If a customer is forced to make too many decisions at one time, they will:

- A. get confused.
- B. buy everything.
- C. walk out without buying anything.
- D. be satisfied.

**17.** If your attempts to cross-sell are not closely related to the original purchase, the customer:

- A. is less likely to take it.
- B. will be satisfied.
- C. will become frustrated.
- D. is more likely to take it.

**18.** Your customer has decided to buy a couch. This is a good time to cross-sell:

- A. a chair.
- B. a loveseat.
- C. a throw and pillows.
- D. All the above.

**19.** Meet the customer's first need, then:

- A. discuss the next highest priority need.
- B. ask for referrals.
- C. answer the customer's objections.
- D. thank the customer.

# Product Knowledge and Mastery

Lack of product knowledge is the single greatest barrier to cross-selling. Product knowledge is the foundation of selling. It makes you more competent, which leads to your customers being more confident in you, your product, and your company.

Now, how do you apply your knowledge to the customers' needs? First of all, if all we needed was product knowledge to make sales, we'd send out the R&D engineers to sell to our customers. Instead, you must have *product mastery*:

combining your knowledge of the product and your customers' needs. Product mastery is the ability to recall and effectively use product knowledge with our customers.

Are you asking yourself, "How do I create product mastery?" First, you must be able to retain all the information.

One of the biggest learning challenges we face is the problem of forgetting. The chart on the next page combines research published in the *Journal of Psychological Science* with research done by Dr. Chester McCall. In the research studies, groups of learners were put through intense learning experiences where they read material, and then reread the material three times. At the end of the experience, they were able to properly recall eighty percent of all the important information. I think we would all agree that that is pretty good. The problem is that even with this effective learning experience, a week later their recall was down to forty-two percent, and two weeks later down to twenty-eight percent - not enough to reach the mastery quadrant that is required for people to be able to effectively use the information.

Traditional product knowledge training, at best, follows this pattern. Salespeople or distributors are typically brought to a central location for a day or more of intensive product knowledge training. When people are given too much information in too short a time period, panic sets in. The outcome is "information overload" and confusion. Their brain is like a sponge. It will absorb only so much before it reaches a saturation point where it will absorb no more. When this happens to salespeople, they learn only what is necessary to get by or just those subjects that come easily to them. The rest doesn't get soaked up and falls by the wayside. The solution is to break down product knowledge training into bite size pieces that can be readily digested, absorbed, and put to work in the field rather than given all at one sitting.

Another learning method is illustrated by the blue line in the chart. This second group of learners read the material only once, as opposed to the three times. Then, instead of re-reading the material, the blue group did one study session where they answered questions about the material. This had a very positive impact on their long-term ability to properly recall the important information. It's very important to note that the questions were fill-in-the-blank and open-ended that forced learners to actively recall the information. For decades, research has shown that students who study using

fill-in-the-blank and open-ended questions dramatically outperform students who study with traditional multiple-choice questions. Even though the blue study session group did much better than the first study group that reread the material three times, it still wasn't enough to reach the mastery quadrant, and without reaching this quadrant, there is little or no increase in performance.

The third group (shown in green on the chart) did one study session after their learning, but in addition, they used digital tutoring software to issue three additional short study sessions: One session two days after their learning, another one week after their learning, and the final session two weeks after their learning. You can see these short study sessions reactivated their memories in such an effective way that the learners reached the mastery quadrant and increased performance. The difficulty with this approach is that what needs to be reinforced in each of the study sessions is different for each learner. This was solved by using digital tutoring software that used artificial intelligence to create personalized study sessions for each learner from one master list of study questions.

The most important thing to take away from this research is that simply learning is not enough. Just re-exposing learners by having them reread the material on several different days is ineffective. It just won't stick and you won't

see any increase in performance. If you want to increase performance, you have to use open-ended and fill-in-the-blank questions over a period of several weeks, until the information is locked in long-term memory and mastery is achieved. Try this: A few days from now, reread this course and answer the questions again. Then do it again the following week and the week after that. You'll be amazed at how much you remember. That's how you turn simple product knowledge training into product mastery and product fluency.

In addition, you must know the features and client benefits of each product. A feature is some aspect of the product or service that exists regardless of a customer's needs. A benefit is the way *that* feature satisfies a need. A benefit is a feature in action. To help identify the features and benefits, use F-A-B worksheet (see next page).

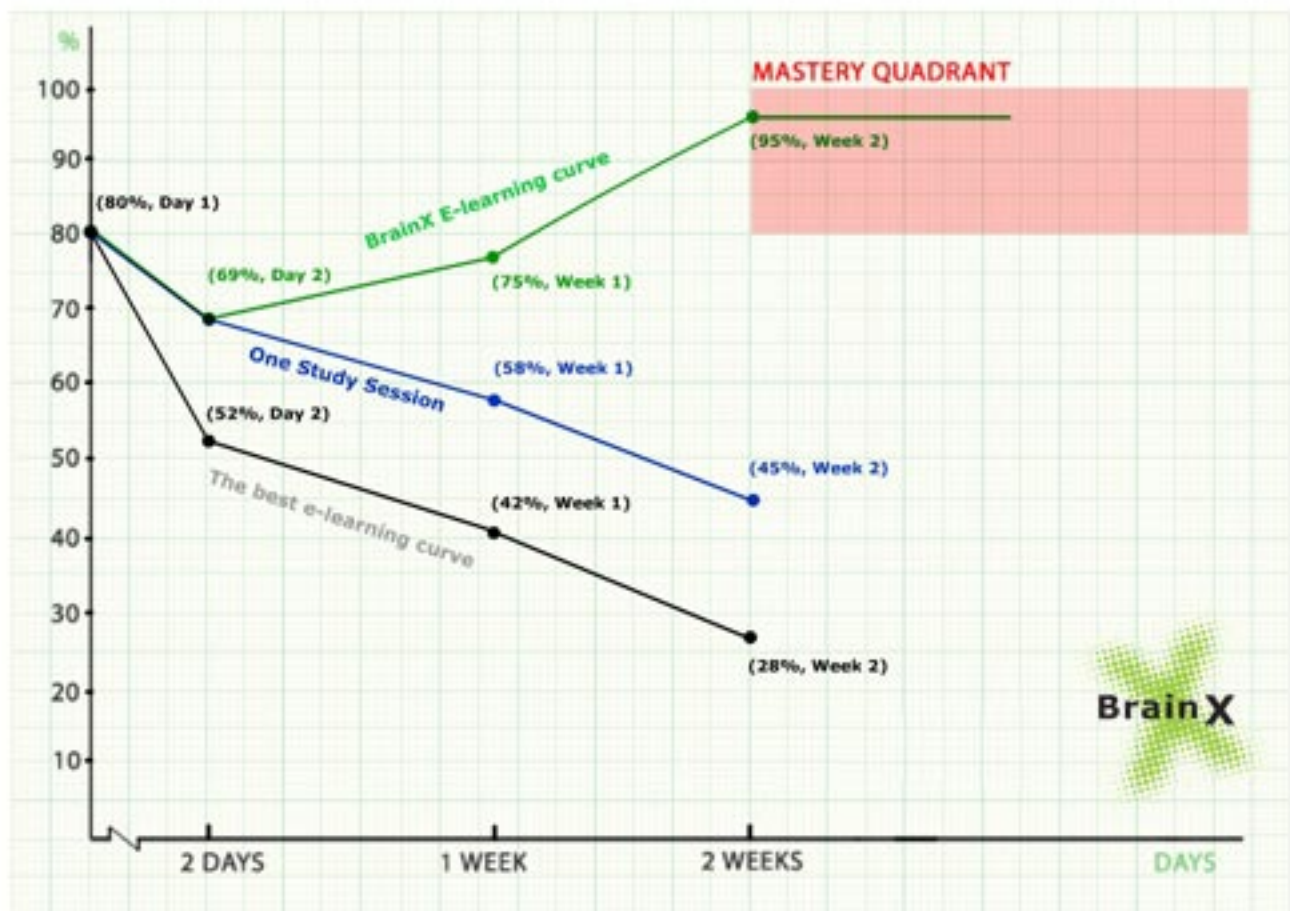
List each feature of a product.

What are the advantages of each feature?

How does each advantage benefit your customers?

Do this for each of your products.

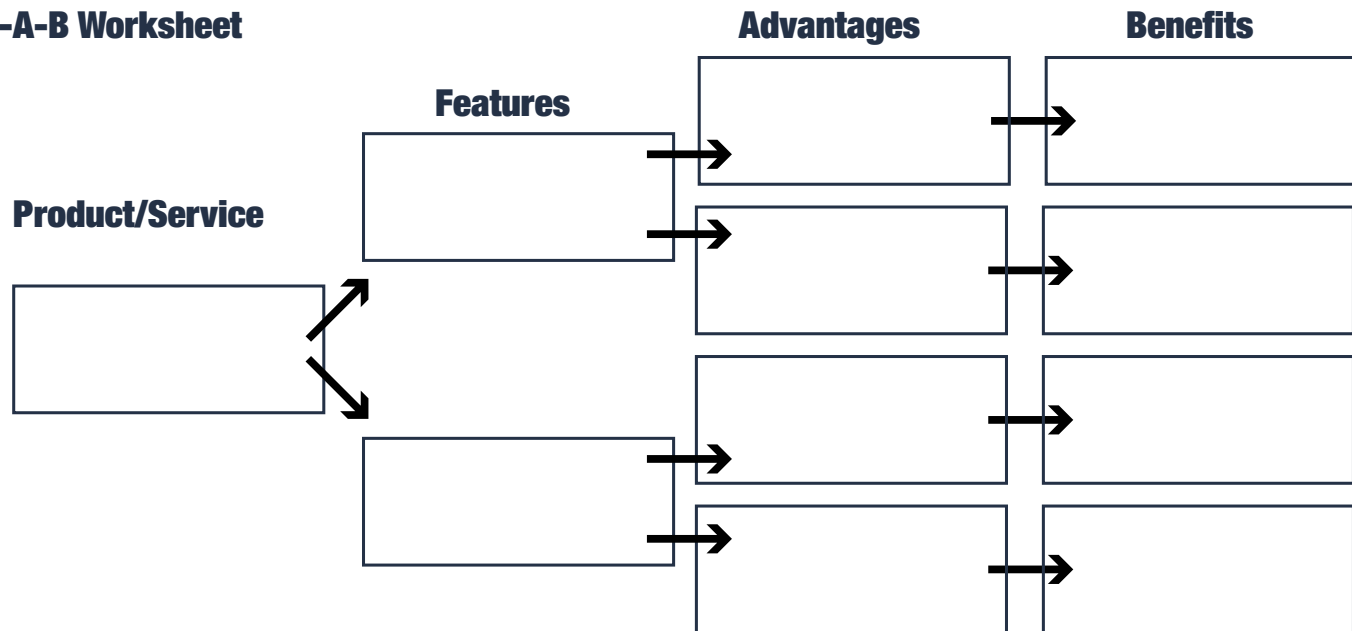
Remember: People buy benefits. They think in terms of benefits. They seldom care how something works; they want to know what it will do for them and how it will solve the problems they are having. They buy safety, not anti-lock



Source: Journal of Psychological Science and Chester H. McCall, Ph.D. Copyright 2006 BrainX.com Inc.



## F-A-B Worksheet



brakes; they buy warmth or ambiance, not a fireplace. By selling benefits, you have a chance to create mental pictures in your customers' minds that help move them toward the sale.

Next, you must know what has changed and why your customers should care. They might not be aware that there is new technology that could help them with their needs. They might not know that they are requesting an older model.

How do your products compare with your competitors'? Analyze the advantages and disadvantages. For each of your competitors, ask yourself, "What can I offer my customers that no one else can?" That's your advantage. Then ask, "Where does the competition have an advantage?" That's your disadvantage. But remember, don't knock your competitors' products or services in front of your customers. Make professional, logical comparisons that clearly show your product's superiority. You don't have to stoop to beating up the competition.

Do you know which customers have the greatest need for your products? Analyze your customers within your database. Compare their needs with each product's features and benefits. By analyzing your customers, you can pinpoint which product is best for which customer.

Keep track of the frequently asked questions posed by your customers. You'll find some questions come up over and over again. You'll impress your customers by being able to answer their questions or concerns. If you don't know the answer to a customer question, admit it and tell the customer you'll find out the answer for them. For each product, you

should know who to call to help you learn even more or to get detailed answers to your customers' questions.

Finally, identify other products that are natural cross-sales for each product you sell.

Is it possible to misuse product knowledge? Yes, and in all sorts of ways. One way is when you ramble on about features that a prospect could care less about. Remember, while it's important to know all you can about your products and services, it's very easy to talk too much about them. Not all customers are interested in the same exact features and benefits, so only focus on the relevant features and benefits for each individual customer.

I cannot stress enough the importance of product knowledge and product mastery when it comes to making sales. Those who have learned everything they can about the products they sell have a distinct advantage over those who haven't. Product knowledge mastery can easily convert to product fluency, not unlike being able to speak a foreign language fluently. Someone who isn't fluent in a language hesitates as they try to do language conversions and think back to how to properly say something. This hesitation comes across as weak and lacking in confidence. On the other hand, people who are fluent process the information instantly, because they can think in the foreign language and they respond with confidence.

The same is true for salespeople. Salespeople who have a general understanding but have not reached mastery lack confidence, hesitate, and appear weak. The result is that they consistently lose out to salespeople who have mas-

Selling Against the Competition

	Advantages (What can I offer my customers that no one else can?)	Disadvantages (Where does the competition have an advantage?)
Competitor A		
Competitor B		
Competitor C		
Competitor D		

tered their material and who are fluent and confident as they present the product and answer objections.

You must master your knowledge of your product and properly recall and effectively use the information stored in your brain. Make no mistake about it; in the sales industry, you had better know your stuff and constantly reinforce what you know in order to excel at cross-selling.

## Product Knowledge and Mastery Follow-Up Questions

**20.** Product knowledge is:

- A. the foundation of selling.
- B. not as important as selling.
- C. only important with referrals.
- D. not necessary.

**21.** Product mastery is:

- A. the ability to recall and effectively use product knowledge with customers.
- B. another term for product knowledge.
- C. not necessary.
- D. only necessary during customer service calls.

**22.** To create product mastery, you must be able to

- A. retain all the information.
- B. know your customers.
- C. recognize customer needs.
- D. work as a team.

**23.** To help retain information you have learned, you should review the material:

- A. immediately.
- B. once later that same day.
- C. one month later.
- D. several times over the following weeks.

**24.** To achieve product mastery, you must know the \_\_\_\_\_ and \_\_\_\_\_ of each product.

- A. features; client benefits
- B. objections; pricing
- C. features; pricing
- D. pricing; competition

**25.** Analyze the advantages and disadvantages of:

- A. your competitors' products and services versus your own.
- B. your customer's needs.
- C. your sales tactics.
- D. product mastery.

**26.** Keep track of the \_\_\_\_\_ posed by your customers.

- A. questions
- B. compliments
- C. observations
- D. interpretation

**27.** Identify \_\_\_\_\_ for each product you sell.

- A. other products that are natural cross-sales
- B. customer email addresses
- C. competitors
- D. other products that are not natural cross-sales

**28.** One way to misuse product knowledge is to:

- A. ramble on about features that a customer doesn't care about.
- B. not use all your knowledge.
- C. share everything you know with your co-workers.
- D. tell your customers everything you know about all your products.

**29.** Those who have learned everything they can about the products they sell:

- A. have a distinct advantage over those who haven't learned everything.
- B. are leaders in their industry.
- C. only have to work part time.
- D. sell twice as much as those who haven't.

**30.** Salespeople who have a general understanding but have not reached mastery:

- A. lack confidence.
- B. hesitate.
- C. appear weak.
- D. All the above

**31.** You must \_\_\_\_\_ in order to excel at cross-selling.

- A. constantly reinforce what you know
- B. be a great closer
- C. know how to prospect
- D. be familiar with your referrals

# Communication with Customers

Communication is important in any relationship, especially in the sales industry. In this regard, you should focus on improving the quality of communication you have with your customers. Let me use a domestic example to drive this point home.

Of the two, parent and child; grandparent and grandchild, who has the better quality of communication, and therefore, usually the better relationship? The grandparent and grandchild, right? Now, the cynics say this is because they share a common enemy. And while there may be some truth to that, if you really look closely, you will find that when the parent talks to the child, they typically try to bring the child up to their level. On the other hand, the grandparent will go down to the grandchild's level, psychologically, emotionally, and physically, eye-to-eye. They adapt to their grandchild's way of communication, as you should adapt to your customer's. Luckily, there are many ways in which you can improve your communication with customers.

It's important to conduct periodic customer reviews. A periodic review can be a major part of maintaining your relationship with your customers. A lot can happen in three months, six months, or a year - people move, get married, have children, change jobs, develop new needs. You have to stay in touch. If the only time you talk to your customers is when you're asking for more money or another commitment, they won't feel that you have their best interests at heart. The periodic review is a good time to catch up with them and make sure you're still meeting their needs. As a result, you'll often find that they will ask for your help in areas not discussed previously.

Like any successful meeting, a periodic review requires planning to be most effective. Arrange for the meeting to take place in an area that is quiet and conducive to conversation. Take notes and send a clean, typed copy to your client within twenty-four hours after the meeting. Be organized - have an agenda of what you want to talk about. Bring all of the records you'll need to discuss the previous period's business. If there are areas where your company fell short of expectations, discuss those first. Outline what steps have been taken to correct the problem.

Most importantly, listen carefully for the customer's stated or implied needs, concerns, and opportunities. This meeting provides a perfect forum for the customer to air grievances, share compliments, and discuss new needs. Your actions demonstrate that you're interested in maintaining an open, trusting partnership with your customer. As in any relationship, open, frequent communication is essential and the periodic review is a key way to enhance your relationship with your customers and uncover new sales opportunities.

You also need to increase the quantity of your customer communication. Like all salespeople, I need to stay in meaningful contact with prospects and clients. It's no secret that top-performing sales professionals have mastered methods for sending the right message, at the right time, to create more selling opportunities for themselves.

To achieve this, I'm leveraging new technology that helps me cement new relationships, remember what services to offer each client, and automatically sends appropriate information at just the right times. This technology effectively cross-sells my products and services, even if I forget.

To communicate with your customers better, create a good database with customer relationship management (CRM) software. Different customers require different actions. Databases and customer relationship management systems enable you to collect information on an ongoing basis, as it must be kept up-to-date. The more information you have, the better your chances of developing a more profitable, personal relationship with each of your customers.

Personally, I use a web-based CRM Communication system called Cyrano that automates all facets of my cross-selling activities for me. Unlike traditional contact management products, Cyrano doesn't remind me to send letters, emails, gifts, and literature; it does it for me and notifies me when clients have received marketing messages from me. More importantly, Cyrano has filtering categories that help me build a profile about every client's specific goals, needs, interests, behavioral style, and preferred modes of communication. Cyrano then matches messages to their profile. I can script personalized, relevant marketing campaigns that cement relationships, help clients achieve their goals, and educate them about specific products and services that solve specific problems.





*My initial screen tells me who is receiving which messages from me each day. Cyrano also emails me this information in case I forget to log-in and look.*



*Remembering special days or events is important for building relationships. Cyrano remembers even if I may forget.*

Type: ☒ Prospect ☐ Client

Level: ☒ A ☐ B ☐ C

"A" Level Client/Prospect: Can receive all promotional items.

"B" Level Client/Prospect: Can receive "B" and "C" promotional items.

"C" Level Client/Prospect: Can NOT receive "A" or "B" promotional items.

Interest Level: ☒ Hot ☐ Warm ☐ Cold ☐ Inactive

Can receive messages for: ☐ Director  
☐ Socializer  
☐ Relater  
☒ Thinker  
☐ Not Profiled

#### Filtering Criteria

**For PERSONAL Growth: Please tell us the outcomes you seek by learning The Platinum Rule (check all that apply):**

- ☐ ~ This does not apply to me
- ☐ I want to enhance my charisma and/or persuasiveness
- ☒ I want to improve my relationship with my spouse/partner
- ☒ I want to improve my relationship(s) with my child(ren)
- ☐ I want to improve my relationships with my friends and make new friends more easily

**For PROFESSIONAL Growth: Please select the job descriptions that you fulfill for your company (check all that apply):**

- ☐ ~ This does not apply to me
- ☐ CEO or Executive that oversees both sales and marketing
- ☐ Consultant, Coach and/or Trainer
- ☐ Customer Service Professional
- ☐ H.R. Executive that coordinates training and development
- ☐ Inside Sales Professional
- ☐ Marketing Manager or V.P. of Marketing
- ☐ Outside Sales Professional
- ☒ Partner / Owner of a Service-Based Business
- ☐ Rainmaker for a Service-Based Business
- ☐ Sales Manager or V.P. of Sales

**For PROFESSIONAL Growth: Please tell us which business outcomes you'd like to achieve (check all that you desire):**

- ☐ ~ This does not apply to me
- ☒ Become a more effective business owner / entrepreneur
- ☒ Become a more effective leader or manager
- ☒ Build a more cohesive, productive team
- ☒ Improve customer service and/or client retention
- ☒ Improve interpersonal communication skills
- ☒ Improve my team sales
- ☐ Increase my personal sales
- ☒ Increase R.O.I. on marketing / lead development
- ☐ Increase R.O.I. on trade show expenditures

**Have you taken your Platinum Rule Online Behavioral Profiling Assessment?**

- ☐ No, and I have no interest in doing so  
☐ No, but I want to learn more about the assessment  
☐ Yes, but only the free version  
☒ Yes, I took the paid version; complete with customized report and E-workbook

**How do you enjoy learning? (Please check all that apply):**

- ☒ Attending Seminars & Workshops  
☐ Listening to Audio Programs  
☒ Reading Books and eBooks  
☐ Watching Video Programs  
☒ x Other (please describe in "message box" below)

**Please tell us how you found "One-to-One from A-to-Z":**

- ☐ Another Dr. Alessandra E-zine  
☐ Attended a speech, seminar or workshop  
☐ Email offer  
☒ Referral from friend or colleague  
☐ Search engine  
☐ Took free behavioral profile assessment  
☐ Web site  
☒ x Other (please describe in "message box" below)

**Relationship with PRG:**

- ☒ B-2-B Lead (Corporate)  
☒ B-2-C Lead (Consumer)  
☐ Bureau/Agent  
☐ Corporate Lead  
☐ Media Contact  
☐ PRG Partner  
☐ Referral Source

**What was your PRIMARY reason for investigating The Platinum Rule?:**

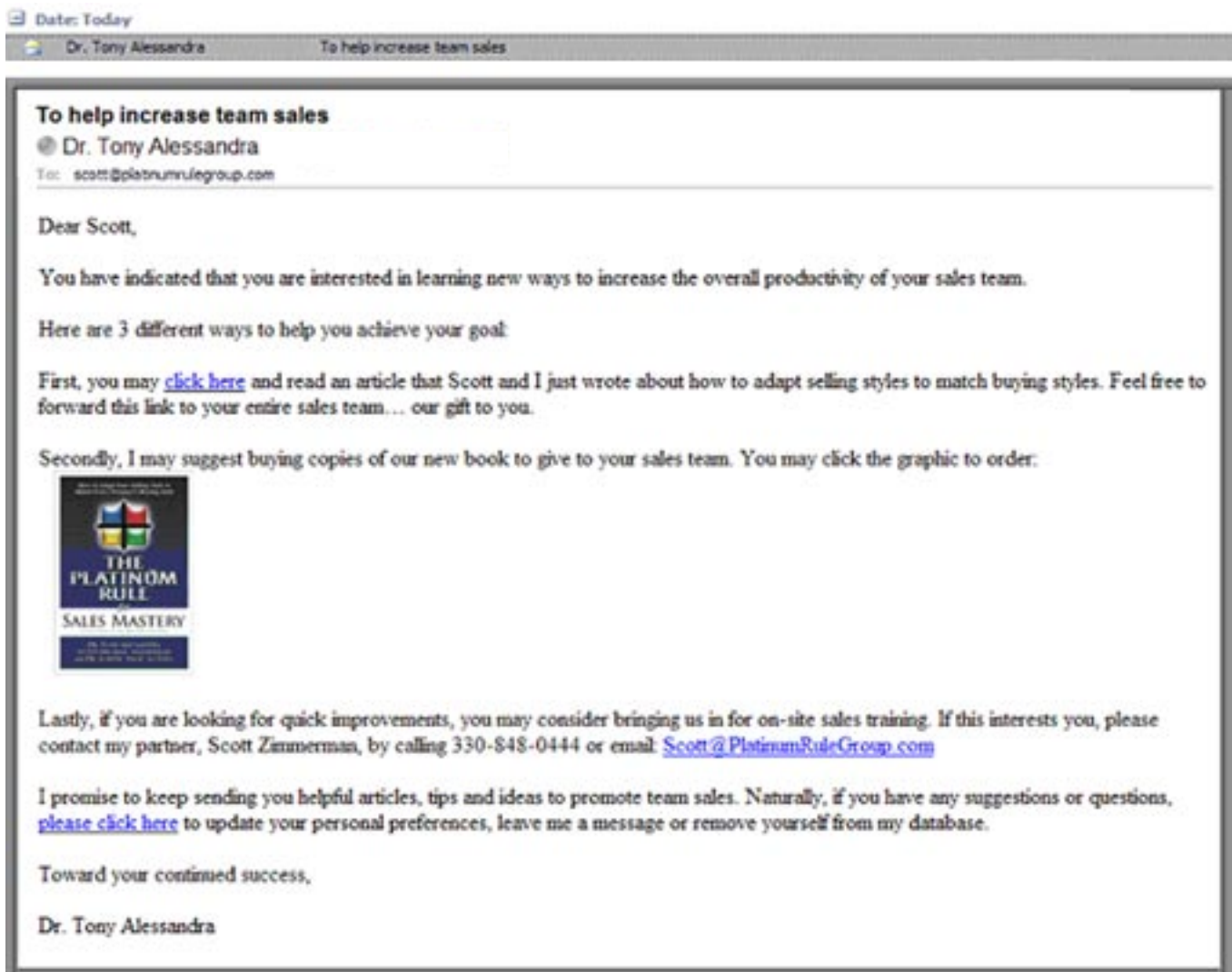
- ☐ For business applications (sales, leadership, team building, etc...)  
☐ For personal growth (friends, family, social, etc...)  
☒ x An equal mix of both

**Notes:**

**Group:**Core Group 

*Cyrano is customized for every company's unique profiling criteria. This unique feature makes it simple to match marketing messages to the wants, needs, interests, and even behavioral style of each contact.*





*Matching messages to specific goals and interests is the most effective way to eliminate attention erosion while building credibility.*



Most importantly, Cyrano requires only about two minutes of my time after each sales call and rewards me by executing follow-ups that build the trust and top-of-mind awareness that equates to effective cross-selling. One feature of Cyrano my clients most appreciate is that every email contains a link that enables them to update their own personal preferences. They can tell me what they want, how they want it, and when they want it, and they can also leave me personal messages about specific challenges or goals they are currently experiencing. In effect, this creates a running “dialogue” between me and my clients that ensures each relationship is being developed in a manner that is pleasing for each customer.

You see, how you follow up after your initial sale will determine how your customer feels about you, your company, and your products and services. Let me tell you a story about a recent experience my friend Scott and I had with the same company. I purchased a high-end laptop computer directly from a manufacturer who offered a service where you can call your personal account representative, or concierge, and get help buying and using your computer at no additional charge. I recommended that Scott use the same service when he mentioned that he was ready to buy a new laptop. He called my sales rep and bought a computer the next day. Unfortunately, his order didn't go as smoothly as mine. His computer arrived a full month after the promised ship date.

Scott mentioned he might want additional accessories during their initial conversation. What a great cross-selling opportunity! Yet the follow-ups he received were horrible. He never received a phone call to see if his laptop had arrived. Nor did he receive an apology for the missed deadline. He never got a call asking if he wanted the extra battery and increased memory he mentioned in his initial conversation. Instead, our personal concierge sent us both the same generic email offers to buy televisions, camcorders, and stereos that were manufactured and sold by the same company. Scott didn't want to buy a television or a new camcorder. This company failed miserably on their cross-selling marketing program, and Scott reluctantly took his business elsewhere.

Like all customers, Scott and I would like to think that salespeople are listening to us while we describe the outcomes we wish to achieve. Had our concierge matched the follow-up emails to coincide with our particular preferences, she would have made easy sales and most certainly

benefited from the referrals we both would have sent her way. However, by putting us into a generic follow-up campaign, the relationships regressed, rather than advanced.

It's critically important that you only send messages to your customers that do three specific things:

**First, thank your customers immediately after they make their purchasing decision. No automation, not even Cyrano, can replace a hand-written note and/or a phone call. Do this yourself.**

**Second, send your customers articles, ideas, and information to help them accomplish other goals or solve specific problems even if they are unrelated to what you sell. Cyrano remembers their preferences and makes it simple to find and send information that matches everyone's specific needs. By positioning yourself as a “helper,” and not a “hawker,” you'll find that your customers want to receive and read your letters and emails, not avoid them when they show up.**

**Third, only send value-proposition messages that educate customers about specific products and/or services that match a stated need or goal. Don't “drip” them with “shotgun” product offerings in hopes that you'll accidentally be in the right place at the right time - this approach will guarantee that you won't be in the right place at the right time. “Attention erosion” is a phenomenon that is growing daily. If you send things to your customers that they have no interest in reading, you can be assured that they will soon quit opening your letters and emails.**

When you keep communication open with customers, you'll open even more sales doors.

## **Communication with Customers Follow-Up Questions**

**32.** You should focus on \_\_\_\_\_ the quality of communication you have with your customers.

- A. improving
- B. analyzing
- C. evaluating
- D. None of the above

**33.** What can be a major part of maintaining your relationship with your customers?

- A. Periodic reviews
- B. Customer complaints
- C. Referrals
- D. Closing the sale

**34.** Listen carefully for the customer's stated or implied:

- A. needs.
- B. concerns.
- C. opportunities.
- D. All the above

**35.** You have to \_\_\_\_\_ with prospects and clients.

- A. stay in meaningful contact
- B. have lengthy conversations
- C. have common interests
- D. work

**36.** To communicate with your customers better:

- A. create a good database.
- B. talk with them on a constant basis.
- C. exchange email addresses.
- D. None of the above

**37.** What enable(s) you to collect information on an ongoing basis?

- A. Customer Relationship Management systems
- B. Customer surveys
- C. Periodic reviews
- D. Emailing your customers

**38.** What automates all facets of cross-selling activities?

- A. Cyrano
- B. Outlook Express
- C. Excel
- D. CrossSell

**39.** Cyrano requires only about \_\_\_\_\_ of your time after each sales call.

- A. 2 minutes
- B. 55 minutes
- C. 2 hours
- D. 30 minutes

**40.** How you followup determines how:

- A. many cross-selling sales you will make.
- B. great a salesperson you are.

C. you will feel about your customers.

D. your customer will feel about you and your company.

**41.** The computer company lost Scott as a customer because:

- A. they didn't follow up.
- B. they never apologized for the delay in shipment.
- C. they didn't listen to his needs.
- D. All the above

**42.** You should send your customer:

- A. a Thank You note.
- B. items that help them accomplish their goals.
- C. value-proposition messages.
- D. All the above

**43.** When you keep the lines of communication open with customers, you will:

- A. open even more sales doors.
- B. have higher phone bills.
- C. earn more commission.
- D. become the top salesperson.

## Likeability and Trust

To be an effective cross-seller, you have to be likeable and trustworthy. People buy from salespeople they like and trust.

Put yourself in the customer's shoes. The willingness to be flexible comes more easily when you can convey empathy and put yourself in the other person's shoes. The feeling of empathy is much easier to come by when you care about the other person and take the time to feel what they're feeling. In the business, political, and professional worlds, that feeling of empathy may not come as easily. All the great teachers of empathy for others start with the same point: You cannot truly feel the pain, or the joy, or the emotion of another until you're able to feel the same thing in yourself.

Do you acknowledge your own pain? Can you feel your own joy? Real empathy lies in simply finding the same place within yourself that the other person is experiencing. You might not have had exactly the same experience, but you've known the sadness of loss, or the anger of feeling

cheated, or the sense of righteousness at injustice. Some of us don't take the time to feel our own feelings, so when someone else expresses a feeling, we don't have much to refer to.

You might be concerned that expressing a caring approach toward another person will result in the other person manipulating you. This isn't about abdicating your own needs or point of view. It simply means that you're able to step into the shoes of another and acknowledge their feelings. Having that ability is an asset.

You have to show an interest in the customer even before they show an interest in any of your products or services. It's personal. Address customers by name whenever possible. Make your customer feel they are more than a customer. Take the time to help them with any simple or complex problems they may have. Take the time to show you care. In order to make a cross-sale, you must do more than describe additional products. You have to go beyond the call of duty, and that includes the three R's: respect, responsiveness, and responsibility.

## Respect

Respect for the customer is the foundation for meeting customer expectations at the personal level. Everything else you do to effectively meet the customer's needs and expectations builds on this foundation. Just what is respect? It's demonstrating to the customer that they are the most important person in the world at this moment. It begins with an attitude that says "You are important and I'm here to serve you."

L.L. Bean has a poster titled "What Is a Customer" that captures this attitude of respect.

**A customer is the most important person ever in this office... in person, by mail, or by phone.**

**A customer is not dependent on us... we are dependent on him.**

**A customer is not an interruption of our work... he is the purpose of it.**

**We are not doing a favor by serving him... he is doing us a favor by giving us the opportunity to do so.**

**A customer is not someone to argue or match wits with. Nobody ever won an argument with a customer.**

**A customer is a person who brings us his wants. It's our job to handle them profitably for him and for ourselves.**

This poster is displayed throughout all areas of L.L. Bean to help keep people focused on the importance of the customer, and to reinforce that attitude of respect.

That attitude should set the tone for every part of your interaction with the customer. But there are certain specifics we need to pay attention to that convey respect to the customer. First are the simple courtesies. A pleasant greeting, an offer to help, the use of the customer's name (if appropriate), and saying please and thank you are all demonstrations of respect.

Next is giving the customer your full attention. Stop whatever else you're doing and focus on the customer. It's also important to listen fully to the customer and make sure they feel heard and understood. Listening without interrupting ensures you understand their needs and expectations. And even appearances, if you serve customers face-to-face, count. Does your appearance and that of your work area show respect for yourself, your business, and your customer?

While respect begins with an attitude, it gets expressed through consistent action. What are the things you need to do to meet your customers' expectation of respect?

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## Responsiveness

In today's fast-paced world and rapidly changing marketplace, the service advantage goes to those who can quickly respond to each customer's unique needs. This means having systems and processes in place that allow for rapid development and delivery of products and services. It means treating each customer's situation as unique. Do you believe you're just like every other person in the world? No, of course not. We are all unique individuals. And as customers, we see our situation or needs as unique. The expectations around timeliness are becoming increasingly demanding. There was a time when the mail was an acceptable way to send written information or material to a customer. Then Federal Express convinced us that it "absolutely positively had to be there overnight." And now we can't even wait until tomorrow. Information has to be faxed or emailed now!

When serving customers, there are several aspects to responsiveness we need to pay attention to. The first is being ready to help. This means having the knowledge and tools we need to assist the customer - being prepared and organized, especially by making sure we have the materials at hand to respond to customer needs.

Next is timeliness. This ranges from answering the phone promptly or acknowledging a customer right away to expediting actions or information. Remember, customers tend to be very impatient. Prompt action is another key to meeting customer expectations. Whether or not you can immediately take care of all a customer's needs, it's crucial that you show some immediate response.

Responsiveness also means demonstrating your willingness to help, communicating to the customer your desire to serve. From the simple "How may I help you?" to, in a problem situation, stating your commitment to resolving the situation to the customer's satisfaction.

Remaining flexible to meeting the needs and expectations of a wide range of customers is a constant challenge. After doing a job for a while, it's easy to see things as routine and handle them in an almost mechanical way. Staying open and adaptable is crucial for creating distinctive service. Banks have found that customers love ATMs for getting cash or checking balances. But only a small percentage of their customers will make deposits or payments through them. Why? Because, if there is a problem, a machine has no flexibility or adaptability. Only a person can do that.

And finally, responsiveness means accessibility, being available to the customer when they need you. This runs the continuum from answering your phone or being visible to the customer to returning phone calls or voice-mail promptly. Make it easy for your customers to communicate their needs to you.

To create a sales advantage, you need to meet or exceed the customer's expectations for responsiveness. What are the specific expectations your customers have in this area? And what can you do to meet or exceed them?

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## Responsibility

Customers want to deal with someone who will take ownership for helping them and getting their needs met. Little is as frustrating to a customer as having a service provider throw up their hands as if nothing can be done. By taking responsibility for the customer and their satisfaction, we create a proactive, professional image.

Being responsible starts with a can-do, take charge attitude. You may not always be the person who can help the customer fully. However, you can take responsibility for making sure the customer gets the help they need. The more people a customer has to deal with to get their needs met, the less satisfied they will be with you. You want to make it easy for them to get what they need. You work for your customers. It's your job to represent the customers and their needs to your organization, because you know the procedures, the organization, and the products and services. Customers don't want or need to figure those out. They just want what they want. That sums up the essence of responsibility.

Meeting the customer's expectations for responsibility consists of five key ideas:

**Own the Customer.** If you can take care of the customer's needs, do so. If you're not the person who can take care of their needs, you own them until you get them to the person who can.

**Know Your Job and Your Organization.** Knowing your job allows you to respond immediately to customer needs, avoiding the delays that can happen when you need to ask someone else or look up information. Take the time to learn about your products and services, policies and procedures. Also, go beyond just your job and take responsibility for learning about your organization. Having the big picture will allow you to better understand what's possible in taking care of a customer. It also will allow you to make sure you can get the customer to the person who can help them, if you're not able to.

**Make It Easy for the Customer.** Many times as customers, businesses place the burden on us to figure out how to do business with them. Where do we go? Who do we call? Which form is needed? What information is required? And on and on. You create a distinct service advantage when you make it easy for the customer to do business with you. Look for ways



to take on the burden yourself and away from the customer.

**Be Proactive.** Look for ways to identify and anticipate the customer's needs. Think about what you would want if you were the customer in this situation, and then find a way to provide it.

**Recover.** When there is a problem, or a mistake has been made, take responsibility for it. First, apologize and own it. You may not have made the mistake or created the problem, but you can still apologize on behalf of your organization. Then take whatever steps you can to fix it. Many people make the mistake of placing blame for problems on the customer. Customers aren't always right, but they are always the customer. Just like the boss may not always be right, but the boss is always the boss. If the customer has a problem, you have a problem. So take responsibility and do what you can to fix it.

Remember, the focus is on the customer. Think of your customer like a friend or family member and take the time to get to know who they are and what they are looking for. They will soon like you and trust you.

## Likeability and Trust Follow-Up Questions

**44.** What is an ability that is an asset?

- A. Dishonesty
- B. Getting to know the customer on an intimate level
- C. Acknowledging the customer's feelings
- D. None of the above

**45.** What is the foundation for meeting customer expectations at the personal level?

- A. Respect
- B. Responsiveness
- C. Responsibility
- D. Reaction

**46.** While respect begins with an attitude:

- A. it ends with no attitude.
- B. it gets expressed through consistent action.
- C. it continues with the same attitude.
- D. it is shown through email communication.

**47.** Who is the most important person in your business?

- A. Your customer
- B. Your co-worker
- C. Your manager
- D. Your top prospector

**48.** What conveys respect to the customer?

- A. A pleasant greeting
- B. The use of the customer's name
- C. An offer to help
- D. All the above

**49.** When a customer approaches you:

- A. stop whatever else you are doing and focus on the customer.
- B. tell them you'll be with them as soon as you are finished with your personal phone call.
- C. find a salesperson who can help them.
- D. help them while you are finishing up on the phone.

**50.** While respect begins with \_\_\_\_\_, it gets expressed through \_\_\_\_\_.

- A. an attitude; consistent action
- B. simple courtesies; kindness
- C. an attitude; simple courtesies
- D. kindness; attitude

**51.** In today's fast-paced world and rapidly changing marketplace, the service advantage goes to those who can quickly respond to:

- A. the customer's unique needs.
- B. problems on the sales floor.
- C. unsatisfied customers.
- D. various compliments.

**52.** To be responsive, you must be:

- A. ready to help.
- B. accessible.
- C. timely.
- D. All the above

**53.** Staying \_\_\_\_\_ is crucial for creating distinctive service.

- A. open and adaptable
- B. in the moment
- C. in a Holiday Inn Express
- D. happy and aggressive

**54.** To create \_\_\_\_\_, you need to meet or exceed the customer's expectations for responsiveness.

- A. a sales advantage
- B. product mastery
- C. a referral
- D. a return customer

**55.** What starts with a can-do, take charge attitude?

- A. Respect
- B. Responsiveness
- C. Responsibility
- D. Reaction

**56.** What allows you to respond immediately to customer's needs?

- A. Being inflexible
- B. Knowing your job
- C. Owning the customer
- D. Apologizing

**57.** A customer has come in to complain about being billed for the wrong product. You weren't the one who made the mistake. You should:

- A. apologize on behalf of your organization.
- B. find the person who did make the mistake and report them to management.
- C. tell the customer they need to talk with someone in billing and hang up.
- D. let the customer know that it wasn't your fault.

**58.** If you focus on the customer, they will soon:

- A. like you and trust you.
- B. buy everything you sell them.
- C. give you all their business.
- D. All the above

## Apostles

In order to achieve success in today's hyper-competitive economy, your company must develop the needed skills to develop long-term relationships with your best customers. Too often, however, the constant push to increase sales and market share from new business leads companies away from their current customers and, instead, towards finding new ones. Such a strategy is a terrible waste of time and money. The most effective way to assure the growth in profitability that every company wants is to turn their existing customers into Apostles.

For far too many companies today, the overriding focus of their growth strategy is on increasing sales and market share. This is eerily similar to what I experienced when I was working my way through college selling cookware door to door. As a beginning salesperson, I naively believed the best way for me to make more money was to make more new sales. The foolish dedication to this premise led me to ignore my past customers in favor of always finding new ones. It was only afterwards, when I found myself working harder than ever before and making less money for the time I invested, that I realized my strategy was wrong. Unfortunately, many companies today are acting and thinking like I did over forty years ago. They dedicate far more of their resources to expanding new sales at the expense of their already existing customer base.

While working with some of the smartest and most successful companies across America since 1974, I have learned that the ability to convert new sales into Apostles for the company is the best path towards stable, long-term growth. Moreover, I have recognized which skills are needed to accomplish this task.

The stairs of customer loyalty is the process which, in a simple, straightforward manner, shows you how to convert your prospects into sales, and then to repeat customers, and finally, into Apostles - a group of fans who will "preach your message" and "sing your praises" to the marketplace. It shows you how to consciously shape a plan for developing your customer relationship skills in a more congruent manner and is a benchmark in fostering and promoting permanent customer relationships for businesses of all sizes in order to survive and thrive in the hyper-competitive economy.

Smart companies look for new prospects that fit the profile of the top 20 percent of their customers who provide nearly 80 percent of their profits. Likewise, they avoid prospects who are the complainers, price-grinders, and transaction-oriented clients.

When a company is ready to make contact with the right type of prospect, three face-to-face steps are used to move to the next stair, "making the sale." Each step depends upon the success of the previous ones, and no step can be omitted without creating disaster.

**Step 1 – Exploring Needs:** Do whatever it takes to become an expert in your prospect's business because "Prescription before diagnosis is malpractice."

**Step 2 – Collaborating on Solutions:** The customer and salesperson work together to find the best solution to solve a problem or seize an opportunity for that customer.

**Step 3 – Confirming the Sale:** Confirming the sale should be a matter of when, not if. It's the logical conclusion to an ongoing communication and problem-solving process.

Smart companies design strategies that ensure that customer expectations are consistently identified, managed, and monitored so that exceeding customer expectations is a foregone conclusion.

Apostles are built through exceptionally strong relationship skills that ensure customer intimacy. Apostles do more for your organization through their goodwill and word-of-mouth than almost any other aspect of marketing or sales. Smart companies look to double the number of Apostles each year by moving prospects, sales, and customers up the stairs of customer loyalty.

Word-of-mouth is increasing in frequency of use, importance, and in its influence in decision-making. When asked

what influences their purchase, nearly twenty-seven percent of consumers said word-of-mouth, compared to only eighteen percent saying television commercials.

How can you cause more word-of-mouth conversations about you, your company, and your products? Create more Apostles within your customer base who will proactively "preach the gospel" for you, your company, and your products.

To turn more of your customers into Apostles, use a simple three-step process that will double your number of Apostles every year for the next three to four years:

1. Make a list of your current Apostles.
2. Write out specifically what you do with your current Apostles - that you either don't do with your other customers or do more of it with your Apostles - that either made them Apostles or keep them as Apostles.
3. Then create a targeted list of current customers, twice as large as your current number of Apostles, whom you can turn into Apostles if you do step two with them.

By turning customers into Apostles, you're creating a fan club. Your fan club can help you cross-sell like you never imagined.

## **Current Apostles: Things I do with them**

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## **Current customers to turn into Apostles**

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### Apostles Follow-Up Questions

**59.** In order to achieve success in today's hyper-competitive economy, your company must develop the needed skills to grow long-term relationships with:

- A. your best customers.
- B. new customers only.
- C. all your referrals.
- D. the average customers.

**60.** The ability to convert new sales into Apostles is the best path towards:

- A. stable, long-term growth.
- B. customer service.
- C. more objections.
- D. closing the sale.

**61.** For far too many companies today, the overriding focus of their growth strategy is on:

- A. increasing sales and market share.
- B. turning customers into Apostles.
- C. getting referrals.
- D. None of the above

**62.** To have a successful sale, you must:

- A. explore the customer's needs.
- B. collaborate on solutions.
- C. confirm the sale.
- D. All the above

**63.** Apostles do more for an organization than:

- A. any other aspect of marketing or sales.
- B. new customers.
- C. the salespeople.
- D. All the above

**64.** When asked what influences their purchase, nearly twenty-seven percent of consumers said \_\_\_\_\_, compared to only eighteen percent saying television commercials.

- A. word-of-mouth
- B. paper ads
- C. Internet ads
- D. store fronts

**65.** By using the simple three-step process to turn customers into Apostles, you will \_\_\_\_\_ your number of Apostles every year for the next three to four years.

- A. double
- B. decrease
- C. triple
- D. quadruple

**66.** Which of the following is NOT a step for turning customers into Apostles?

- A. Making a list of current Apostles
- B. Writing out what you do with the Apostles
- C. Creating a targeted list of current customers who can be converted to Apostles
- D. Calling current Apostles



# Cross-Selling Summary

With cross-selling, you can greatly increase your sales and keep your customers happy, all with less effort than constantly trying to get new customers. Just remember to keep a few key ideas in mind:

- Satisfaction with the current solution most strongly affects a customer's willingness to purchase additional products.
- Focus on the customer's needs instead of pushing a product.
- Solve and close one customer need at a time.
- Lack of product knowledge is the single greatest barrier to cross-selling.
- Your frequency of communication with customers uncovers new sales opportunities.
- Customers buy from people they like and trust.
- Get your best customers to cross-sell for you.

Also, remember that the key to information retention is reviewing material, so don't forget to re-read this workbook and answer the questions on a regular basis to truly master the material. And have fun selling!

## Summary Follow-Up Questions

**67.** What most strongly affects a customer's willingness to purchase additional products?

- A. Satisfaction with the current solution
- B. Word-of-mouth
- C. Effective closing skills
- D. Effective objection-handling skills

**68.** What is the single greatest barrier to cross-selling?

- A. Lack of product knowledge
- B. Customer dissatisfaction
- C. Ego
- D. Lack of respect

**69.** Your frequency of communication with customers:

- A. uncovers new sales opportunities.
- B. helps reduce customer complaints.
- C. shows that you care about referrals.
- D. All the above

**70.** Get your best customers to:

- A. cross-sell for you.
- B. purchase everything you cross-sell to them.
- C. write you testimonial letters.
- D. help you win your sales contests.

# Answer Key

## Introduction

- 1. A
- 2. A
- 3. A
- 4. A

## Customer Satisfaction

- 5. A
- 6. C
- 7. A
- 8. C

## Focus on Customer Needs

- 9. A
- 10. A
- 11. A
- 12. A
- 13. A
- 14. A
- 15. A

## One Need at a Time

- 16. A
- 17. A
- 18. D
- 19. A

## Product Knowledge and Mastery

- 20. A
- 21. A
- 22. A
- 23. D
- 24. A
- 25. A
- 26. A
- 27. A
- 28. A
- 29. A
- 30. D
- 31. A

## Communication with Customers

- 32. A
- 33. A
- 34. D
- 35. A
- 36. A
- 37. A
- 38. A
- 39. A
- 40. D
- 41. D
- 42. D
- 43. A

## Likeability and Trust

- 44. C
- 45. A
- 46. B
- 47. A
- 48. D
- 49. A
- 50. A
- 51. A
- 52. D
- 53. A
- 54. A
- 55. C
- 56. B
- 57. A
- 58. A

## Apostles

- 59. A
- 60. A
- 61. A
- 62. D
- 63. A
- 64. A
- 65. A
- 66. D

## Summary

- 67. A
- 68. A
- 69. A
- 70. A



## **Tony Alessandra, PhD, CSP, CPAE**

**Building Customers, Relationships, and the Bottom Line**

Dr. Tony Alessandra helps companies build customers, relationships, and the bottom line. Companies learn how to achieve market dominance through specific strategies designed to out-market, out-sell, and out-service the competition.

Dr. Alessandra has a street-wise, college-smart perspective on business, having fought his way out of NYC to eventually realize success as a graduate professor of marketing, an entrepreneur, a business author, and a keynote speaker. He earned his MBA from the University of Connecticut and his PhD in marketing from Georgia State University.

Dr. Alessandra is president of **Online Assessments** ([www.OnlineAC.com](http://www.OnlineAC.com)), a company that offers online assessments and tests; co-founder of **MentorU.com**, an online e-Learning company; and Chairman of the Board of **BrainX**, a company that offers online digital accelerated learning programs.

Dr. Alessandra is a widely published author with 14 books translated into 17 foreign languages, including **Charisma** (Warner Books, 1998); **The Platinum Rule** (Warner Books, 1996); **Collaborative Selling** (John Wiley & Sons, 1993); and **Communicating at Work** (Fireside/Simon & Schuster, 1993). He is featured in over 50 audio/video programs and films, including **Relationship Strategies** (American Media); **The Dynamics of Effective Listening** (Nightingale-Conant); and **Non-Manipulative Selling** (Walt Disney). He is also the originator of the internationally-recognized behavioral style assessment tool **The Platinum Rule™** ([www.PlatinumRule.com](http://www.PlatinumRule.com)).

Recognized by *Meetings & Conventions Magazine* as “one of America’s most electrifying speakers,” Dr. Alessandra was inducted into the Speakers Hall of Fame in 1985. He is also a member of the Speakers Roundtable, a group of 20 of the world’s top professional speakers. Tony’s polished style, powerful message, and proven ability as a consummate business strategist consistently earns rave reviews.

To learn more about Dr. Alessandra and his services, visit [www.Alessandra.com](http://www.Alessandra.com).

# Other products from **Dr. Tony Alessandra**

## Email Series

**The Platinum Rule** 52-week Email Series

**Sales Skills** 52-week Email Series

## Videos

**Astounding Customer Service** Complete DVD Package

**The Platinum Rule** Two-Hour DVD

**The Platinum Rule** Video Training

## CDs

**10 Qualities of Charismatic People**

CD Version

**New Relationship Strategies** CD Version

**Secrets of Ten Great Geniuses** CD Version

## MP3s

**Alessandra on Collaborative Selling**

downloadable mp3

**Alessandra on Customer Driven Service**

downloadable mp3

**Alessandra on Nonverbal Communication**

downloadable mp3

**Alessandra on Platinum Rule**

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**Alessandra on The Power of Listening**

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**Astounding Customer Service**

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**Dynamics of Effective Listening**

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**How to Gain Power and Influence with People** downloadable mp3

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**PeopleSmart** downloadable mp3

**Simplicity** downloadable mp3

**The Edge** downloadable mp3

**Powerful Presentation Skills** downloadable mp3

**Resolving Conflict** downloadable mp3

## eWorkbooks

**Cross-Selling** 25-page PDF eWorkbook

**The Platinum Rule** 50-page PDF eWorkbook

**Power of Listening** 54-page PDF eWorkbook

**Goal Setting Strategies** 38-page PDF eWorkbook

**Customer Driven Service** 53-page PDF eWorkbook

**Charisma** 35-page PDF eWorkbook

**Time Management** 37-page PDF eWorkbook

**Flexibility** 25-page PDF eWorkbook

## Paper versions

**The Platinum Rule Workbook**

Paper Version

**The Platinum Rule Self-Assessment**

Paper Version

**The Platinum Rule Scoring Matrix**

Paper Version

# eReports

**Conducting Powerful Meetings** 33-page PDF eReport

**Time Management** 37-page PDF eReport

**Using Space and Time** 15-page PDF eReport

**Versatility** 27-page PDF eReport

**Writing Skills** 24-page PDF eReport

**Telephone Skills** 8-page PDF eReport

**Resolving Conflict** 23-page PDF eReport

**Presentation Skills** 19-page PDF eReport

**Speaking With Authority** 17-page PDF eReport

**Sending Out Your Best Silent Message** 19-page PDF eReport

**Personality Chemistry: Preventing Conflict at Work** 13-page PDF eReport

**Nonverbal Communication** 10-page PDF eReport

**Maximizing Your Adaptability** 20-page PDF eReport

**Listening Attentively** 14-page PDF eReport

**Interpersonal Communication** 37-page PDF eReport

**Expanding Your Vision and Ideas** 14-page PDF eReport

**Flexibility** 25-page PDF eReport

**Becoming More Persuasive** 13-page PDF eReport

**Conducting Powerful Meetings** 33-page PDF eReport

# eBooks

**The Platinum Rule** 163-page PDF eBook

**The Platinum Rule® for Sales Mastery** 118-page eBook

**Street Smarts** 75-page PDF eBook

**PeopleSmart** 269-page PDF eBook

**Non-Manipulative Selling** 179-page PDF eBook

**Collaborative Selling** 133-page PDF eBook

# Assessment Tools

## Online Assessment Tools

**Platinum Rule Assessment**

**True Colors Assessment**

**Leadership Assessment**

**Listening Assessment**

**Sales Effectiveness Assessment**

**Social Styles Assessment**

**Time Management Assessment**

## Paper Assessment Tools

**The Platinum Rule Self-Assessment**

**The Platinum Rule Observer Assessment**

**The Platinum Rule Scoring Matrix**

**Platinum Rule Reminder Card**

# Other Alessandra Products

**The Platinum Rule** Reminder Card

**The Platinum Rule** Training Student Kit

**The Platinum Rule** BrainX Digital Learning System (Software)

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Dr. Alessandra's company, Platinum Rule Group LLC, offers seminars, workshops, and on-site training to corporations and organizations in the areas of sales, one-to-one marketing, customer service, and interpersonal relationships. For more information, call: 1-330-848-0444 x2 or email: [info@PlatinumRuleGroup.com](mailto:info@PlatinumRuleGroup.com).



# Cross-Selling

## eREPORT

If you have found this information useful, you might want to check out some of the other products available on my web site. I would specifically suggest:

### **Collaborative Selling** — 132-page PDF eBook

In Collaborative Selling, I share my own personal experience and lessons-learned as a salesman to show you the difference between making sales and making a customer. You become partners with your customers and spend more time in the beginning building a foundation. You'll learn how to develop quality, lasting relationships that will make true, loyal customers who will continue to buy over and over again, and refer you endlessly to other deep-pocketed people.

### **The Edge** — Six-Hour Audio Program on downloadable MP3s

"Six easy steps help you increase your sales, get more referrals, and earn higher commissions." The Edge is built around my Collaborative Selling system. It contains strategies and techniques that ensure you team up with your prospects. They now see you, not as a pesky salesperson out to make a buck, but as an expert consultant working on their behalf. Once you finish this audio program, you'll know each Collaborative Selling sales step and how and when to use them. This is not brain surgery - but it is powerful. It becomes second nature to you. You'll be able to watch as both your sales and your commissions smash your old records and set new standards.

### **Astounding Customer Service** — 80-minute Audio Program on downloadable MP3s

How much is a valued customer really worth to your business? Do the math. It costs you up to 4 times more to get a new customer than it does to retain an existing one. That doesn't even take into account the fact that an unhappy customer will tell an average of 20 customers about their bad experiences, while a satisfied customer will only tell 10 people about their good experiences. This means you have to make twice as many customers happy as unhappy, just to break even!

Call me stupid, but I'm keeping my customers happy and satisfied... and the only way to do it is through Astounding Customer Service! Download this 80-minute MP3 series right now on your computer and you're moments away from acquiring the most critical and valuable skill that could mean thousands (maybe more) to your bottom line.

### **Astounding Customer Service** — Complete Package

Over 35 years of the customer service secrets that have helped me tremendously in my own business career and saved me from many ruined customer relationships along the way. This package builds on the material in the audio program above, and includes: DVD - All eight chapters (segments) on Customer Service (approx. 80 minutes) PLUS three chapters on Listening Skills (approx. 36 minutes) with a PDF Workbook PLUS two chapters on Telephone Skills (approx. 25 minutes) with a PDF Workbook

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