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Monika D'Agostino

# Naked Prospecting

MONIKA D'AGOSTINO

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# **NAKED PROSPECTING**

Naked Prospecting

1<sup>st</sup> edition

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ISBN 978-87-403-3429-6

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# ABOUT THE AUTHOR

Monika is a business growth expert and the Founding Principal of the Consultative Sales Academy, a company that provides sales expertise consulting, C-Level Lead Generation as well as unparalleled blended e-Learning & Live Consultative Selling & Business Development Training Programs. Monika's key expertise lies in her ability to guide her clients to embrace a consultative sales approach that helps them establish a common Sales & Service Language which ultimately results in increased revenue, shortened sales cycles and more ideal prospects and clients.

Monika is passionate about sales and her mission is to elevate the reputation of sales and its practitioners. Why? Because somebody has to do it!

Monika's experience in selling and providing training solutions to leading organizations such as TiVo, Fedex, XPO just to name a few puts her and the Consultative Sales Academy in a unique position to understand the changing challenges of our business environment.

Born in Vienna, Austria, Monika moved to the U.S in 1994 where she quickly embraced the faster-paced business environment without losing sight of her European roots and remembering that in the end it is people who matter. Due to her heritage, she brings a great deal of international knowledge to her portfolio, which has proven to be important to companies who want to spread their wings internationally.

Monika's approach is both strategically consultative and bottom-line oriented. Identifying objectives and executing realistic coaching and training, results in an increase in business, a better understanding your market, and successfully expanding your service offering. Monika is native bi-lingual in English and German.

Monika is also the author of the book ["Selling & Dating - And How They Are Similar"](#).

# 1 WHO IS YOUR AUDIENCE?

You're at your desk – you are thinking you're ready to pick up the phone and you start dialling – then, WAIT! Who are you going to call?

So, before you even start reaching out to people, you need to understand your prospect-universe, in other words, the companies and the people you want to be targeting. If you've been in sales for any amount of time, you'll know that still today, far too many salespeople just dial for dollars which results in (sometimes) interesting conversations, but not always leads to revenue. As a matter of fact, EVERYTHING we do in sales should result in revenue, otherwise it doesn't make sense.

My mantra has always been: *Sales is a Process* – and we all need to have a well-planned and executed *Process* to be successful.

Years ago, I had an interesting conversation with a sales leader of a leading Fortune 50 technology company. He shared with me that his salespeople had become “professional visitors”. I asked him what he meant and he said that, in his opinion, his salespeople had simply been taking people (*his words: “whoever still had a pulse”*) to play golf and or to lunches or dinners with no regard of their role, title or responsibility. As long as these prospective clients showed any interest in their service offering, they qualified as a prospect. Well, I guess that is certainly one way of “qualifying” prospects! – Perhaps not the best, though!!

This might be all well and good when you work for a huge, international brand, although, in today's environment it doesn't seem to hold true anymore, either. But when you are a salesperson representing a smaller organization and prospecting is part of your daily responsibilities, you have to make a case as to why potential prospects should even have a conversation with you. And therefore logically, it becomes crucially important to understand who your target audience truly is.

## 1.1 DON'T BOIL THE OCEAN

When we try to “boil the ocean” (in other words, targeting as many prospects as possible without applying any qualifiers), we tend to miss out on great opportunities. Plus, we lose something that is key to the success of a good salesperson – TIME! And we **DO NOT** want to waste precious time.

Salespeople choose the sales profession for many reasons. On top of that list is usually the ability to make a lot of money while having fairly flexible schedules.

Flexibility is a great benefit, but it also comes with a price. The price we pay in sales is that we are only as good as the last sale we made. This means that we must make sure that our time is spent on activities that help us target the right audience, that is, the real decision-makers, so we can close a sale.

Every single action we take needs to take us to a next step in our sales process and should help us get closer to closing business. This also means that our time management must be impeccable.

What does that mean for you and me? Well, you need to have (or develop!) really good organizational skills to keep yourself on track. Once we start reaching out to ANYONE with a “pulse”, we might find that many so-called potential prospects might not be a good fit for our service offering. And there we went and WASTED precious TIME!

## 1.2 FINDING THE RIGHT DECISION-MAKER

The first step to success PRIOR to reaching out to prospects is to identify the right decision-makers and influencers in a prospective client organization.

When we start in a sales role, or in a new industry, we need to find out who the people are who will buy our product or service.

With today's on-line capabilities and amazingly comprehensive sources of information, there are many ways to do that. But no matter where we source our information, we need to do some homework.

Contrary to popular belief, the best salespeople are not the ones who have the best personality (although that doesn't hurt 😊) - the most successful salespeople are the ones who are diligent, reflective, consistent and full of passion.

A common dilemma I've seen in so many organizations is, that while most salespeople have a lot of passion, they don't always want to put in the hard, sometimes tedious, work. Remember what I share at the very beginning of this Chapter? Sales is a Process and success doesn't happen overnight.



Ultimately, Sales is hard work AND comes with great rewards and feelings of success! So, in that vein, there is no silver bullet and no quick-fix and finding the right decision-maker is no exception.

Let's remind ourselves again - NOT every prospect is a good fit for your product or service offering. Let's start with that.

So, in what companies will you find your "perfect buyers", you might ask. And who are those "ideal prospects?"

That, too, involves a process for you to be able to find out and act on effectively.

Let's look at an example here.

Imagine you have just started a sales job with a company that offers a technology enabled solution. These days we see an ever-growing increase of B2B offerings which are technology enabled. So, it's of utmost importance to find out exactly what your company's solution will do to benefit your prospects. You can't find the right decision-maker if you don't know what the value of your offering is and how it will help them.

For the sake of this example, let's imagine you work for a company that offers a solution that helps companies optimize their workflow.

- a. An excellent first step is to see what the competition is up to and what they are saying about their product/solution. Chances are, they will talk about the technology (that is, the features) rather than the value it brings to their clients. This is already a great opportunity for you to stand out, because most companies focus on the bells and whistles of their offering instead of speaking to their prospects and clients in a way that they (the customers) understand how much value they can derive from utilizing a solution.
- b. The second step is to identify your *ideal* industry/industries. Which companies will most likely buy this solution? Again, look at your competitors, see where they have good use cases. Then find other companies in that industry. The likelihood that your competitors chose that industry because there was money to be found is high. In a worst-case scenario, you will at least have good exploratory conversations with people who are already familiar with a concept. One of the most challenging things to do in sales is to evangelize a product or solution that is completely new to the marketplace. That involves much more buyer education which can prolong the sales cycle.

- c. Your next step - look for that “magical” low-hanging fruit! If *YOUR* company has a successful use-case, utilize this as a great opportunity to approach more organizations in that industry. For example, if your company has a successful engagement with a client in the Logistics industry, you’ll want to research and start reaching out to other companies in that space. This is a good first step, although it doesn’t always guarantee success. As can happen anytime in sales, your company’s Logistics client might have signed an engagement for reasons that don’t resonate with other companies in that industry. Therefore, it’s always good to think about and find out from your peers why existing clients and decision-makers have purchased or might have bought your solution.
- d. Let’s stay with the example of workflow optimization. That’s something that could really be applicable to everybody on the planet, because who wouldn’t want to improve workflow, right?

You’d be surprised. Depending on your solution, there might be technology requirements that have to be in place to implement. Or, there could be reluctance to acquire new technology. Also, some people you speak with might be threatened by technology and block the sale. That means you need to be well-educated on your company’s product/service offering and any industry-related compliance or technical requirements.

- e. Talk to the Top Executives First! After decades of success in sales in multiple industries, I have found that starting your conversations with C-Level executives FIRST, puts me in the best possible position to make headway with a new prospect.

You might be thinking, “Oh, my goodness! The Big Bosses! Why would I do that?” Well, the overriding reason is, because they are always interested in efficiencies, in saving time and money and making MORE money, more profits, and increasing stakeholder value.

- f. Which Top Executives to start with? OK, let’s break the C-Level down a bit, and stay with our example of a workflow improvement solution:
  - a. COOs: Traditionally, COOs in mid-sized to large companies could be in charge of operational enhancements, such as workflow, and therefore a good person to target. It is important, though, to make sure you understand the internal make-up and landscape of the company you are targeting. Check out their website, read their Press Releases, look up the executives on the web, and dig deep into their LinkedIn profiles (if they have one!).

- g. If the organization you are targeting is smaller, you will most likely have more success targeting the CEO or Owner/Principal. My experience has shown that they often stay involved in almost every single decision until their company is at a stage where they can step away from the day-to-day decision-making process.

AND it's also your best bet for success. Once you have the CEO engaged, they will probably refer you to somebody on their team. I'm sure you can imagine that an introduction from the big boss goes a long way, right?

All right, I can already hear people hyperventilating just thinking about engaging with the CEO. And I can sympathize – though, in that respect you can trust me - it's a lot easier than you think!

First of all, CEOs don't get targeted as often as mid management. Therefore, they are not as inundated with phone calls as we might think.

Secondly, they have a particularly vested interest in the success of their company. So, when they hear about a concept that makes sense (and creates value in their minds), they are more than open to help.

And last, but not least – you won't be wasting your time. If you get a “NO” from the CEO, you should move on and call on another company. Don't waste your time talking to other people in that organization, as they would need to get the buy-in from their boss anyway. So, you can shorten your sales cycle by taking meaningful and successful shortcuts!

- h. Now we have just mentioned “concepts which create value in a CEO's mind”. We will go deeper into Creating Value in this book again and how to apply creating value successfully (starting in Chapter 2). But as a starter, here are the generic reasons why people would buy from you:

1. You/Your solution can help them save/make money,
2. You/Your solution can help them save time,
3. You/Your solution can help them streamline and create efficiencies,
4. You/Your solution can provide them with peace of mind,
5. You/Your solution can elevate their company's reputation or their own reputation.

If you cannot talk about your solution or product in a way that it will create value in your prospect's or client's mind, you don't really have anything to sell.

Again, for the sake of the example we have been using - selling a solution that improves workflow - you would potentially be able to incorporate all the value points listed above. By implementing a system that improves workflow, you will be able to incorporate items 1-3 and if you are lucky and your system provides everything you promised, you will also be able to target items 3 & 4.

Now how do you put all that into words which comes naturally to you? Well, we will get into the nitty-gritty of how to create specific messaging to certain audiences throughout the following chapters in this book. Keep READING!

### 1.3 REVIEW: ACTIVITIES & TASKS CHECKLIST: CHAPTER 1

You can use this Checklist as a Starting Point for your own version of a Pre-Contact Planning Prep



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and hundreds more

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✓	Activities & Tasks Checklist	Times (if applicable) & What Achieved?
	<b>Daily Prospecting Prep Times</b> - depending on your experience 1 to 2 hrs <b>AND</b> <b>WHEN</b> to execute your <b>Prospecting Outreach</b> – You should plan at least <b>2 hours</b> a day for this.	
	<b>Check Out Your Competition</b> – What are they selling? Who are their customers? What are their customers saying?	
	<b>Your Ideal Industry/Industries?</b> – What industries are your competitors selling into? Who should you be targeting according to direction given to you?	
	<b>Low-Hanging Fruit</b> – What internal use-cases can you use to find similar prospective customers?	
	<b>Check out Technical/Compliance or Regulatory Requirements</b> for your solution in your industries	
	<b>Research Top Executives</b> in your ideal industries specific to your offerings – CEOs, COOs, CMOs, CTOs, CIO, CSOs, Owners/Principals, etc	
	<b>First Steps in Translating your Offering into VALUE</b> – Make your attempts using the generic Value Points: <ol style="list-style-type: none"> <li>1. You/Your solution can help them save/make money,</li> <li>2. You/Your solution can help them save time,</li> <li>3. You/Your solution can help them streamline and create efficiencies,</li> <li>4. You/Your solution can provide them with peace of mind,</li> <li>5. You/Your solution can elevate their company's reputation or their own reputation.</li> </ol>	

## 2 WHERE TO BEGIN?

In a situation where we need to sell, whether as a business owner or a salesperson, we can sometimes feel overwhelmed and we don't know where to start.

What companies should we approach?

Who should we reach out to?

What do I say or write to grab their attention? And so much more ...

We then may start to do (too) many things at the same time, often without a plan and the results can be disappointing. Successful salespeople *ALWAYS* have a plan. They know what to do that day, what their goals are for the month, the quarter, the year. And not only when it relates to numbers, that's the "easy" part, because it is dictated to us. We don't control our quota or performance numbers other people assign it to us.

What *IS* important, is to know how we will be able to achieve that number.

How much productive, sales-process based activity do we need to generate in order to sell or achieve those numbers?

### 2.1 WHAT APPROACHES ARE BEST FOR YOU?

In my experience, as well as that of hundreds of successful sales professionals we have surveyed and coached, the best way to maximize your time and resources is to assess your territory and sales potential.

Let's assume your quota is \$1Mio a year. How do we break that down and manage our desk?

Well, history is usually a good predictor of what can happen in the future, right?

So, find out a few parameters to help yourself:

1. What was the average sale or the average range the year prior?
2. How many new or renewed agreements do you need to close in order to get to that number?
3. If renewing client agreements or expanding business with existing clients, which ones can you prioritize to devote more time to re-signing?
4. How much of your time should be dedicated to reaching out to new prospects?

In any event, you want to make sure that you understand your universe, that is, the industries that you will be targeting. Then you can start building your plan.

For the sake of an example, let's assume you need to reach \$1Mio in sales in Workflow Optimization Solutions and you have two industries geographically assigned to you in the U.S. Northeast. One is Technology and the other is Logistics.

The first thing you will want to do is research both industries in your geographic area.

- a. How many prospects are in each? (That is, unless you are given prospect lists to work with, in which case, go straight to the next step.)
- b. How do you want to rank them?

Depending on your solution, you want to rank them by number of employees, revenue, geography, or other drivers, such as Public vs. Private, etc. You also might want to go a level deeper to see if you can find prospects who have spent money on workflow process improvement in the past. (See sample ranking list format below)

Prospects	No. of Employees	Revenue	Public/Private	News	\$\$ Spent	Connections You Have	My Ranking

And with today's social media solutions, I can only warmly recommend that you also use LinkedIn to see if you have any connections in those prospective organizations whom you can ask for introductions or referrals. Whatever it is you decide to be the best way to prioritize, you need to DO IT and keep doing it.

Then, based on your selection criteria, choose, for starters, 50 companies in each industry.

- a. Research the company and the person(s) you are planning to reach out to BEFORE YOU CONTACT THEM. Also remember that on average there are over 6 decision-makers in Fortune 5000 organizations.
- b. Based on your research, develop a value-based message (which we will explore in detail later on),

- c. NOW you can start reaching out, AND PLEASE (!!)
- try to avoid mass emails or mass communication. That is, unless you have been tasked with driving a broad message for brand building and awareness, but that should really be the responsibility of the marketing department.

When it comes to prospecting, every person should be treated with the respect they deserve and that can only happen when you do your research thoroughly.

## 2.2 WHAT VALUE DOES YOUR ORGANIZATION'S SOLUTION BRING TO PROSPECTS?

Here is a very important and often not fully comprehended essential:

*Value exists **ONLY** in your prospect's/client's mind.*

If they don't perceive something you are offering to be of value, it simply just isn't.

People CANNOT be forced to want and then purchase something which they don't perceive to be of value - and I'm sure you've experienced this yourself.

Allow me to give you an example: If you are selling a workflow process improvement solution and your buyer thinks that they are in good shape (or even practically perfect!), and won't consider your solution, in spite of you positioning the solution so it would make sense to them (in your mind), your best bet would be to walk away respectfully. You won't be able to win over a person so convinced of their decision, you will only frustrate, or even worse, anger them and you might also ruin the opportunity to build a long-lasting relationship. And here's another important item to remember: **NO** is not **NO FOREVER** – it's **NO, not now**.

So, for the sake of this example, let's review the value drivers which would be meaningful to a prospect. Again, people buy because ....

1. You can help them save/make money
2. You can help them save time
3. You can help them streamline and create efficiencies
4. You can provide them with peace of mind/security
5. You can elevate their company's reputation or their own reputation



As mentioned in the previous chapter, the most expedient and successful out-reach approach is to start at the top of the organization – always – YES – Always!

You may ask **WHY?** (while shaking in your boots – it can be intimidating).

Well, it's easier to work your way from the top levels of an organization down to middle management but harder to work your way up through an organization if you start with middle management.

You might even get stuck there! And we don't want to get STUCK!

We have found that mid-level management can sometimes be protective of their “turf” and may shy away from “outside” improvement for a number of reasons.

One of those reasons could be that your solution might actually replace their area of responsibility or job. Sounds like a good reason to be cautious of advances in technology, doesn't it?

Another might be that they had recommended a solution in the past which didn't bring the expected results.

And we could go on with many more, but let's get on to how to align your value drivers with decision-makers.

### **Re: Value Drivers 1 – 3**

So, when you **do** reach out to the C-Level, you will be well served in talking about efficiencies, revenue improvement and achieving more (of their targeted) success.

Whether it's the CEO/COO or CFO, they are always looking for ways to save money or time – and increase revenues (= make more money or increase profits).

When approaching a COO (if they head up all operations), you will find they generally are looking to create and improve efficiencies.

Needless to say, all of them want to generate more **profitable** revenue!

**Re: Value Driver 4**

Let's talk a bit about "providing peace of mind or security". It seems at first glance to be a no-brainer, right? And in many cases, it is. If your solution is cutting-edge, cloud-based anti-malware, then we can assume we can lead with the peace of mind and security your solution provides.

But let's widen our view and think about the subjective and emotional element of "peace of mind". When you can move your prospect's thinking from the technical capacity and proven track record of your solution, to them trusting **YOU**, then you are creating a deeper sense of security and connection. Now, that's big!

**Re: Value Driver 5**

When it comes to elevating the company's reputation, you'll find that most C-Level decision-makers will show interest, unless they firmly believe they have reached their pinnacle. In other words, if they think nothing can be improved within their organization.

Now we look at being able to elevate an individual's reputation, that's something which most prospects will respond to, generally regardless of their role in a company.

It's a human desire to shine and be acknowledged. Further on in this book, we'll examine more in detail how to better position this value driver based on your prospect's specific behaviour and personality.

One thing we have observed over the years is that you're more likely to leverage elevating a person's reputation when you are collaborating with middle-level management and SMEs (= Subject Matter Experts). This is most effective when you can find ways to help a person show their worth (= enhancing their value) internally by choosing and recommending your solution.

As you will naturally want to help your prospects make those decisions to work with you more easily and show them that it will help, rather than hinder, their careers, you must make sure to offer spotless references and good use-case studies. Additionally, as we mentioned previously, you must have done your research and have excellent knowledge of their organization and what they are looking to achieve, and finally, a relationship with you which they can trust.

Let me share a personal example: When I started out in sales (eons ago!), one of my first clients was GE Capital. The first buyer I partnered with, was awarded the “Communicator of the Year” award by GE Corporate because this person chose a solution which was implemented with great success. It was a very prestigious award within the GE organization. As a result, I was able to engage with all the other GE entities, because they now all wanted to partner with me on the solutions I and my company could provide.

So, what does that mean for you?

I cannot stress enough how essential it is to tell stories about successful engagements when prospecting which your prospects or clients can relate to. And if you or your company have had engagements in a related industry, it's all the easier for them to relate to.

A quick example: Somebody in the pharma industry will have a hard time understanding a use-case in the utilities sector, right?

That's why it's so important to choose industries where you or the company which you represent, already can show some success.

## 2.3 WHAT IS YOUR UNIQUE SELLING PROPOSITION?

Your USP, or Unique Selling Proposition is what makes you different. It's one of the most difficult things to develop, but it's worth spending time on and engaging with your supervisors and co-workers.

Now, remember, for you to craft your USP, you truly need to understand what it is that you are offering and how you stack up against the competition.

Let's return to my example from Chapter 1: Workflow Process Improvement Solutions. They are bountiful – just Google it. So, if you are selling “Workflow Process Improvement Solutions”, it is *YOUR* responsibility to find out what makes your solution unique (with the help of your co-workers and managers, of course!).

**Step 1:** As I pointed out in Chapter 1, you want to study the competition. What is that they are saying about their solution.

**Step 2:** Have conversations internally to find out why existing and past clients chose your company's solution.

- a. If there are different reasons for each existing client, you need to do more digging.
- b. If there is a common thread, for example your dashboard has the ability for employees to chat with each other, then you want to focus on that.

**Step 3:** Think about the “WHY” (that is, what creates VALUE):

For example, WHY would “chatting” be important to your prospects?

Well, internal communication is key to success within an organization. So, being able to connect with other employees while they are logged into a central platform is easier and more secure than having to go out of that platform, use another communication solution, and then go back into their workflow platform.

### **OK, SO WHAT ARE THE VALUE DRIVERS, HERE?**

Our “Workflow Process Improvement Platform” helps employees SAVE TIME,

AND it also creates work efficiencies,

AND provides peace of mind. WHY? Because it’s easier to use (workflow-friendly) applications and the technology is better encrypted (for example) than switching to another communication platform.

Another example would be that your solution offers a version that is accessible on mobile devices. This would enable people to enter information while they are away from their desks or on the road – widespread and essential in many industries.

This would not only save time; it would also reduce errors and information gaps or emissions (people often forget to input information when they are traveling or away from their workstations).

Errors and information gaps can lead to a loss in revenue or lost opportunities. So, you are also providing peace of mind, and possibly helping an organization MAKE MONEY!

## 2.4 LET'S CRAFT IMPACTFUL MESSAGING

It's my ever-resonating experience and deepest belief that – “It's all about your messaging!”

What is it that you want to communicate to the people you will be reaching out to? Remember, people buy because ...

1. You can help them save/make money
2. You can help them save time
3. You can help them streamline and create efficiencies/
4. You can provide them peace of mind/security
5. You can elevate their company's reputation or their own reputation.

In order to craft a message that will resonate with your prospects, you need to keep this in mind. People buy from people, so everything you do when connecting should be a combination of a personal message with effective positioning.

To stay with the example of workflow optimization, let's think about who would find value in optimizing workflow within an organization and how it could help them.

Let's look at examples of emails which we could send to various C-level people.

**Starting at the Very Top: Reaching out to a CEO** (not to worry – they are human beings like you and me!):

When approaching the CEO, we want to be concise and to the point. Most CEO's are people interested in results and want to get to the point quickly. So, the sooner you catch their attention, (and get to the point!) the better. Even if they are no longer involved in the day to day business, they will refer you to the right person **IF** your message is indeed attractive to them.

Let's have a look at an example:

*Subject Line: Workflow Optimization*

*My intent is to connect with you as the leader of (xxx company) to discuss how we could provide you with a solution that will help you optimize your workflow process to eliminate errors and information gaps, save time and money, and create efficiencies.*

*I will call you tomorrow at 3 pm ET to speak more about how our approach can help you achieve your goals.*

We focused on the high-level in this email, giving the CEO a very short description of what the conversation would be about, and we state a follow up, creating the sense of a concrete action step (= getting things done).

Keep in mind that everyone gets emails all the time – If there is no definite action step your email might be misinterpreted as a mass outreach.

Now, there are at least three scenarios. Let's start with the three most common:

- a. The CEO writes you back to say that they are not interested.
- b. The CEO refers you to the person responsible for the topic of your email.
- c. There is no response, in which case you need to follow up at the mentioned time.

So, how do we handle each of these scenarios?

- a. In the first scenario, you have actually elicited a response, albeit a negative one. But remember! “No” doesn't mean “No, never” – it's “No, not right now.” (From our point of view, that is.).

Reply with a message thanking the CEO for taking the time to respond, congratulate her/him on what they have already achieved (you did your homework, right?) and gently suggest that “as things may change in the future”, you will reach out again in six months (then actually reach out in 3 months). And this is very important for each prospect –KEEP Doing Your Homework: follow the organization and the CEO and follow up at any time if you find out mention-worthy news regarding the company.

- b. What do we do in the 2<sup>nd</sup> scenario?

You make that call the next day at 3pm ET!

- a. Now, if you encounter a gate-keeper, such as an executive assistant, you can say that you are following up on an email, so she/he (the CEO) is expecting your call (that's the truth, right?). Be Prepared to speak to the CEO!! (We'll go into detail on how to prepare a bit later on.)
- b. Should you get voicemail or be directed into voicemail: Reference your email, Repeat the message from your email and State that you will send another email.
  1. As soon as you hang up the phone, send an email with the Subject Line: ***Following my previous voice mail*** with the following message.

*As mentioned in my voicemail which I left you earlier, I wanted to speak with you about optimizing your workflow. As a result of implementing our solution, our clients (such as XYZ) have been able to reduce human error, save time and money and most importantly create peace of mind that operations are working the way they should.*

You can repeat this process as often as you want, or until you get a response. What's important to keep in mind is that this works like advertising. The more often you say the same thing (using similar words and a different order) the higher the likelihood that your message will resonate and/or be remembered. We are all very busy people, so repetition is key to success.

Remember, ***Sales is a Process!***

### **Now, let's look at reaching out to the CFO.**

As much as getting to the best results and improvements, with driven C-Level executives, they are generally drawn to new and improved methods and actions to save money and become more profitable.

*Subject Line: Workflow Optimization to Reduce Cost & Increase Profitability*

*Dear xxx,*

*My intent is to connect with you to discuss how we could help you save substantial labour costs and increase your profitability by providing a solution that will help you optimize your workflow process to eliminate error, save time and money and create new efficiencies.*

*I will call you tomorrow at 3 pm ET to speak more about our approach.*

Basically, it's a very similar email but I changed it around a bit, focusing on the cost savings, because that's what CFO's care about most.

### **Now, on to the COO.**

*Subject Line: Workflow Optimization to Create New Efficiencies*

*My intent is to connect with you to discuss optimizing your workflow processes to eliminate error and create efficiencies and future proof your processes. In collaboration with other companies in your industry, such as (XYZ), we have developed and provided successful and sustainable solutions. I'd like to speak with you to see if we could do the same for you.*

*I will call you tomorrow at 3 pm ET to provide more information about our approach.*

Again, I used similar copy, but this time I focused on the operational efficiencies that are generally important to a COO. Future Proofing is also something that is important to people who are charged with operational efficiencies.

You want to find ways to help them develop processes that ensure future success. Nobody wants to go back and have to redo things over and over. This is also where the “Elevating your Reputation” part comes in.

If you help a CFO save money, or a COO improve processes and your solution truly fulfils your promises, it will not only improve the company’s reputation in their industry but also their reputation internally and in their field. This sometimes leads to promotions, other times to that person being recognized as a thought leader in the industry.

And that could help them find another challenge. So, guess who they will call if that person starts working with another employer?

**YOU!!**

### **A Chapter-End Note**

The individuals with whom this message will most likely NOT resonate are the ones who actually manage the current processes. Let’s think about this particular example, Workflow Optimization Processes. That’s their area of responsibility. Think about it: if they had wanted to streamline or further optimize a process, they should have thought of it themselves and reached out to you or your competitors, right?

If you were to reach out to them first and speak about the value of your solution, they might be fearful that your solution might put them out of a job OR damage her/his reputation.

You’ll always want to remember that before picking up the phone or sending off an email. That’s one of the many reasons why I encourage people to start at the C-level rather than reaching out to mid-management whenever you can.

As mentioned previously, you might get stuck there, being blocked to communicate to their bosses.

So, how do we deal with potential emotions around fear? To answer that, we will discuss FEAR (Buyer & Seller Fears) in the next chapter of this book but be acutely aware – Fear can be a strong, driving force in the sales process. In this example, the fear of losing a job is

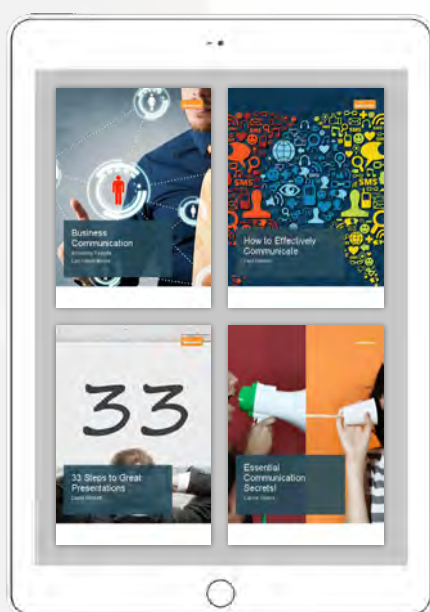


ever present, especially in today's production processes world with much talk about robotics replacing human labour. So, I truly suggest proceeding with caution.

## 2.5 REVIEW: ACTIVITIES & TASKS CHECKLIST: CHAPTER 2

Set yourself up for success. Get organized. Here's a suggestion for an overview chart of what information you can/should research and collect.

Prospects	No. of Employees	Revenue	Public/Private	News	\$\$ Spent	Connections You Have	My Ranking



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Prospect & Value Driver Checklist		
On your List of Prospects, which Value Drivers are the best fit:	Prospects' Positions (CEO, CFO, etc.)	Value Drivers
1.		
2.		
3.		
4.		
5.		
6.		
7.		
8.		
....		
Notes for Crafting Impactful Messages for your Prospects		
Prospects	Your Messaging	

### 3 MUSTERING THE COURAGE TO REACH OUT – IT'S HARD TO ASK A QUESTION IF YOU'RE AFRAID OF THE ANSWER

In my role as a sales trainer and sales executive, I can see that many salespeople have great conversations with their prospects. We also see that the results don't always reflect their efforts. Just over 50% of sales professionals actually achieve their quotas.

We previously discussed that it takes time to research, prepare and develop a good approach. And then, when a prospect finally responds, the excitement often leads to what I would call an **"FHS"** – a **False Hope Scenario**.

It's a quite common trap that salespeople often step into. But why? Well, I've found that there are two reasons. For one, most people want to be liked and secondly, many salespeople like to have good conversations, but that doesn't always mean they lead to a sale. Does that sound like anyone you know?

Now let's have a look at the reality on the other end of the phone line/computer screen. We'll find some of your prospects also want to be liked AND if they are outgoing and chatty, they will talk up a storm with you. Suddenly, it's 30 minutes later and all you know is that you both like the same sports team and your ancestors are European/African/Asian/etc.

Don't get me wrong, there is nothing amiss about having nice conversations, but you need to be strategic, get down to business and ask questions, and some tough questions, too. And knowing today that most buyers do a great deal more research before having conversations with potential vendors (statistics reflect buyers are well into their purchasing journey by some 20% – 30%, perhaps even up to 50%), we need to become **Question-Asking Pros!**

Asking questions is the only way to identify whether a prospect could be a potential buyer, or just somebody you have had a nice conversation with.

So, what's stopping so many good people from reaching out daily AND with a strong, strategic plan in place? All the evidence from years of surveys conducted by an ever-increasing number of organizations paints a picture of many salespeople being fearful of calling on prospects.

### 3.1 F.E.A.R. (OR FALSE-EVIDENCE-APPEARING-REAL)

Like this section title states, fear can be also be dissected as: **F.E.A.R** = *False Evidence Appearing Real*. Just because somebody is short with us doesn't mean they won't buy from us. They could be a person (like myself) who likes to get to the point fast, get business moving and once we have agreement that there is a common goal established, we can get chatty, **that is, talk about things other than how you can help me achieve my goals.**

One reason why so many salespeople still today don't ask the right (and sometimes "tough") questions is that they are sometimes (or too often) afraid of an answer they don't want to hear. As mentioned previously, most people want to be liked. Which can mean that once they have had a conversation with somebody who is open to chatting, they don't want to "spoil" it by asking deep-diving questions, such as "*Who else is involved in the decision-making process?*" This question is a difficult one for many people, because you might find out that you have been barking up the wrong tree.

In other words, your contact might tell you that they actually don't make any decisions on the purchasing of your solution, that they are only "screening" potential vendors and that their boss or bosses make all the decisions. What to do then? Well, you will need to uncover and speak with the real decision-makers.

Another hard question would be: "*If we agree on the terms as discussed, will you be partnering with us?*" You want to hear a "Yes" in some form, right? But this is exactly the scenario a vast majority of salespeople fear the most. Their prospect might say "No, we are not ready to buy"! And you may have been convinced you would get a "Yes". What do you do now? What went wrong?

Well, in this case, you will need to back up and determine what steps in the process you may have skipped and not realized that your prospect is not ready. Or, possibly, what tough questions you had avoided to ask up to that point.

In fact, there might not have been an opportunity for a sale which you had failed to recognize if you had asked the right questions. But it is good to find any of these issues out!

I understand, it's not easy for most people to be tough, but one can be "tough" without being pushy or rude.

The key is to develop a process where every single conversation or interaction you have with a prospect leads to a next step. In other words, you guide the prospect on a path where, in the end, you will close the business one commitment at a time.

As I had mentioned before, sales is a process and if you follow that process it will be less personal to you and easier to digest for your prospects.

Everybody who lives in the business world knows what sales calls entail. There is one person who is selling something to another person. Quite a simple concept and it doesn't have to be daunting at all as long as we follow our process and you speak from a place of integrity and knowledge.

First off, if you approach prospects who would be a good fit for your service offering, they will be open to talking to you, if you can reveal to them that you can actually help them to solve a problem. If a company is struggling with processes and they can save money, for example, by fixing human errors, they will be delighted to partner with an organization that can help them do exactly that.

If, however, you are the salesperson who just dials for dollars and you keep talking to people who don't see value in your solution, then it's an unbalanced situation, i.e., a situation where one person needs to push and the other one might feel shoved.

Keep in mind that the people you are talking to also don't want to waste their time simply chatting to strangers! So, once you have completed the business of your sales conversation, you can start building a personal relationship and, if they are so inclined, be as chatty as the situation allows for.

People buy from people they trust and if you come from a place of integrity and you offer something of value to another person, they will appreciate it. They will also be grateful if you ask questions that will move the process along.

I don't want to sound like the "Godfather", but it really is business, not personal. Just because you like somebody doesn't mean that you will buy from them. If the shoe doesn't fit, you need to move on and the sooner you find out that a sale will be unlikely, the better for you, because you can move on to the next prospect.

We will touch on that later in the book again, but "NO", is the second-best answer because it helps you evaluate the situation. Sometimes, it's a "not now" and sometimes it's not a fit and it's up to you to determine the difference.

### 3.1.1 RECOGNIZING BUYER'S FEARS & HOW TO HELP THEM OVERCOME THEIR FEARS

There is this famous saying in the sales world: “Nobody has ever gotten fired for hiring IBM”. What that means is that it is comparatively easier to sell when you represent a trusted, well-established brand. And if you are not in that advantageous situation, you will have to all the more prove yourself and the validity of your solution and the company you represent. Even when the solution offered by a well-established brand turns out to be not ideal, nobody will be held to the highest extent of responsibility for making that decision, because most others probably would have done the same.

As a personal example, I once collaborated with a company that chose an SAP solution which turned out to be a nightmare, for many reasons. None of which were a poor reflection on SAP, it just wasn't a good fit for that particular company. I personally know one person who had opposed choosing SAP and he had to face the consequences of speaking out against that choice.

This company is still struggling with their SAP integration, but who would ever argue that a company with worldwide acclaim and recognition might not be a good fit?!

That's what brings us to **Buyer's Fear**. Most individuals who have to make a buying decision, have some kind of fear of ending up experiencing buyer's regret. It doesn't matter if it's a pair of shoes, a car, or in the business world a product or solution.

Making the wrong choice could potentially result in that person losing their job. Think about it! If you convince your superiors to go with a certain product/solution and it turns out being far less than an ideal choice, you will probably face the consequences.

Understanding that your prospects are facing these fears when working with you is important for you to foresee their fears, provide empathy and support in making the right decision – EVEN if it means referring them to another solution if you determine that yours is NOT a good fit. They will not forget that.

It is your job, our job, to make sure that all their fears are addressed and put to rest, otherwise you won't get a commitment.

One way to help you reduce stress in the sales process is by providing case studies and references that help your prospect understand how you helped other companies.

If you have clients who are happy with your services, always ask them to be a reference. In working with my clients, I like to provide recognition and reward them for becoming a trusted resource. Two ways which have worked well for me have been to either reduce some of the cost of my product/solution or provide additional training at no additional cost. And there are many other ways to reward them as well. Be creative!

And what is that worth to you? Well, it's so much easier when engaging prospects and you can say: *"We are working with xxx company and they have been using our solution for xx years. I am happy to give you the name of the person who is our contact, so you can talk to them."*

That is how I built my brand and company, by building a strong network of references who are more than happy to talk to my future clients.

As they say - What goes around, comes around!

And because of this success, I warmly urge you to also be all about paying forward. For example, when my clients come to me and ask me for a favour, I drop everything to help them. Whether it's finding new talent, assessing new salespeople or advising them with a difficult situation, my clients are always at the top of my priorities.

If you conduct yourself in that way, you will be able to build that network around you. People buy from people and sometimes we don't achieve our numbers because there are underlying human interaction issues simmering.

### **"There's nothing to fear, but fear itself."**

I know that it's hard to admit it, but we all have been afraid at times. Afraid to buy or afraid to sell. There is no shame in it. The sooner we understand the psychology of a process, the faster we will be able to face those feelings and to adjust our behaviour.

To borrow one of FDR's most quoted statements that will forever hold true, *"There's nothing to fear, but fear itself."* I sit in on many sales meetings with and for my clients and the focus is usually on numbers, prospects to pursue, accomplishments, etc. And while this is important, my belief is that it would be of additional help to management and sales teams if there were discussions about the "softer" areas of the sales process.

## Buyer's Fear is Real

We need to understand and acknowledge a buyer's fears in order to help our clients and prospects overcome that feeling and move forward. The most common fears are:

1. **Fear of Paying Too Much** - It's vital to understand how important a buyer's perception is and how it can affect your success. Clients and prospects alike want to know that they have been able to get close to your bottom line.
2. **Fear of Change** - The fear of change is a very real fear for many buyers. When someone is comfortable with the product or service they have been using for years, making a change to a new product or service is threatening to most people.
3. **Fear of What Others Will Say or Making a Mistake** - I dare to say that almost all of us wish to avoid ridicule. Most clients and prospects are going to make sure that if they move to a new product or service, there won't be a negative focus on their decision by their peers or their boss.

**So, now we have a list of Fears to work with. What can we all do to help our prospects and customers overcome Buyer Fears?**

### 1. Fear of Paying Too Much

Obviously, no one wants to pay too much for a product or service. It's vital to understand how important a buyer's perception is, and how it can affect your success. But what does it really mean to pay too much? Clients and prospects alike want to know that they have been able to get close to your bottom line.

So, how do you deal with this? How you talk about price (or their overall investment) and how you negotiate is particularly important. When speaking about their investment, stress the overall value that they will receive instead of the benefits or features. Speak to cost versus price, and overall investment and savings over time. In negotiating, make sure that the buyer will give something in return for each concession that you make. You definitely want to maintain your price integrity. This also supports your goal of the buyer realizing you don't have a lot of leeway to radically reduce pricing.

### 2. Fear of Change

The fear of change is a very real fear for many buyers. When someone is comfortable with the product or service they have been using for years, making a change to a new product or service can be threatening to many people. And we must always be aware of the fact that change is harder for some than others.



So, how can you deal with this? Think about using a variety of persuasion strategies aimed at calming fears of change. Make use of strategies to gain commitments and close the sale that match your customer's or prospect's buying psychology. Some buyers see value in retaining a major portion of what works well and only changing minor areas that call for improvement. Others prefer to see major change and improvement but wish to keep some smaller elements that do work well. You can identify the preference by asking them questions such as: *"What do you like about your current solution/or solution provider?"* The answer to that question can determine whether you want to offer something that requires a major change, or if you want to start with a slight change in their current situation. For people who are afraid of major changes, it can be daunting if you offer them something that will disrupt their status quo.

### 3. Fear of What Others Will Say or Making a Mistake

I dare to say that almost all of us wish to avoid ridicule. Most clients and prospects are going to make sure that if they move to a new product or service, there won't be a negative focus on their decision by their peers or their bosses. So, how can you deal with this? Be sure to stress how your product or service has helped other similar companies enhance and/or improve their products or services. Suggest a final meeting with your contact's associates or supervisors to reassure that everyone is on board with the change.

Another way to eliminate fear in the sales process is to always "Under-Promise and Over-Deliver". The quote: *"Showing up is 80%"* is not only true in sales, it's essential. There are far too many salespeople who promise things and then don't follow through. If you agree on an action step by a certain date you absolutely need to make sure that you meet that deadline. Sometimes, you might rely on internal resources to keep your promise, but in any event, you need to keep your contact abreast of developments. Otherwise you will be breaking your promise and that will have an effect on your relationship. People buy from people they TRUST! The only way to ease your prospect's fears is to help them feel comfortable with you, so they know once they partner with you and your organization, they will be taken care of.

#### 3.1.2 YOUR OWN FEARS & WHAT TO DO ABOUT THEM

Here we take a look inward – into ourselves. Whether we are inclined to admit it or not, a good many of us have some level of the Fear of Selling. It might also be the fear of actual success that lies deep within us.

It's not the "darkness of failure" but more often it's the light of success.

A few words of wisdom regarding a character, the Cowardly Lion, in the famous film, "The Wizard of Oz" as described by Frank Baum, the author (for those of you who have had the opportunity to see it.).

*"Since lions are supposed to be 'The Kings of Beasts,' the Cowardly Lion believes that his fear makes him inadequate. He does not understand that courage means acting in the face of fear, which he does frequently. Only during the aftereffects of the Wizard's gift, when he is under the influence of an unknown liquid substance that the Wizard orders him to drink (perhaps gin) is he NOT filled with fear. He argues that the courage from the Wizard is only temporary, although he continues to do brave deeds while openly and embarrassedly fearful."*

Sales is a very emotional profession because we have to put ourselves out there every single day and we are only as good as our last sale. Also, we must not neglect that sales *is* a number's game and if we don't produce, we will not earn, which makes it even scarier.

Therefore, we need **Courage**. Let's look at the Wikipedia definition of courage: ***"Courage is the ability and willingness to confront fear, pain, danger, uncertainty, or intimidation."***

Pretty straightforward and clear, but what lies underneath?

People who are not courageous demonstrate their fears – Fear of the consequences of their actions (at the same time not being able to understand that *NOT* taking action also has consequences), afraid of trying something new, afraid of their own courage.

The question is, how much courage does it take to pick up the phone and to talk to a stranger? A lot of courage, and I'm sure if you are reading this book, I don't have to tell you this.

But the bigger question is, what are the consequences of not taking action? Well, we know that they are even more devastating than being rejected.

In sales, the lack of courage is mostly due to the fear of being rejected and not wanting to lose the sale. We've often witnessed salespeople accommodating and conceding concessions to hard negotiating buyers rather than pushing back and working toward a level playing field.

We have far too often seen salespeople overselling – we understand that they don't want to lose the sale, BUT they are forgetting that overpromising will have long-term, and most certainly, negative effects.

Courage is essential when doing business in a successful way. Most successful people have had to overcome ridicule and criticism and have had to muster up an enormous amount of courage to prevail.

There is no success without failure – AND without courage we just stay mediocre.

Remember, there is no business practice where you have to bring your whole self in as much as when selling. Whether it's selling a product or a service, sales is emotional and personal and business!

We sales professionals live by how well we perform. That means our livelihood is in the balance every day, every call, every client interaction.

### **So where does this fear originate?**

For front-line salespeople, it often starts with the cold calling/prospecting efforts which many have reported to be terrified of. And here's a little hint to sales managers and C-Suite executives – Salespeople who don't like cold calling will most likely try to avoid it at any cost!

It could be a mindset issue that is keeping you from breaking through to others. Although counter-intuitive, being afraid of success is something fairly common in the business world (or on a personal level). In a sales environment it's a lot more transparent and easier to detect. The effects are also a lot more drastic, because so many salespeople depend on earning commission.

### **Not every salesperson is good at everything! So, what to do about that?**

There are an array of options to either outsource the lead generation process, or to develop an inside sales lead generation team. Many companies who have taken that path have seen sales soar as a result. The “front-end” of the sales process (filling the pipeline) is the one area that can be outsourced successfully with great results. Developing qualified opportunities is the toughest part of the sales process (I know, because I do it for my clients on a daily basis) and sometimes it makes sense to hire specialists.

**Afraid to Ask for a Sale?**

Not everybody is equipped to ask for money. And that is an essential element of what we need to do in a sales environment. We are asking people to trust us and to part with their or their company's funds. If our prospects end up buying from us and the product/service doesn't meet their needs, we will be held accountable for that decision. All of those areas are deeply emotional and directly connected to mindset. Any salesperson can be trained on how and when to ask for a sale that is not fear-inducing with the right training program!

In the world of sales, fear is often irrational. Just as some of us are afraid of flying because we don't like being up in the air, or we're afraid the plane will crash, and we could die, and we have no "control". Doesn't sound very rational when we put it in those terms, does it? Take the fear of public speaking - it is so intense that some people freeze up although there is no imminent danger lurking.

One of the most effective ways for any sales professionals to be more comfortable in a sales environment is to develop confidence. Confidence often stems from having been successful, so when companies establish an environment where salespeople are nurtured and trained rather than pushed and reprimanded, success flows more freely.

**To All the (Sales) Managers Reading This**

First off, my hat off to you for leading your teams and working to help improve everyone's capabilities, since you are reading and working through this sales improvement companion book! Thank You!

One of my suggestions for smarter management is that your organization should always take steps to better understand what your salespeople are good at and where their opportunities for growth and improvement lie. This is essential to support and help sales professionals be (more) successful.

If you have a strong cold caller on your team, tap into that talent (trust me, it is rare) and, for example, share commission revenue when business is closed! And when you recognize that you have a strong "closer" on your team, think about how to integrate that person into final meetings to lend support.

In my opinion we very often ask too much of salespeople and that can result in some people feeling overwhelmed – which then results in panic, desperation and in the worst-case scenario unprofessional behavior.

So, in the end, it's like life. We need to understand what we are good at and where we have areas of growth potential. We need to develop strengths and nurture the areas of opportunities through training and support. The investment you make can pay off manifold if you choose training that actually effects real behavioral change!

And finally, just maybe, some salespeople might not really be equipped to be in sales. You might detect that in the way they position your company offering, or in their attitude and/or work habits. You will definitely find out if revenue is lacking.

And you can also assess their sales acumen. There are a wide variety of sales assessment tools in the marketplace. My company, for example, offers Sales & Service Skills & Knowledge Assessments. These are not examinations or tests, but rather quick and thorough methods to measure sales & service skills and knowledge.

They serve as vehicles for self-assessment and for managers to understand the performance gaps of their team members. Our **Sales IQ™** Assessments help provide insights on the strengths of sales and service professionals as well as action steps for improvement.

### **3.2 MAKING A PLAN: PRE-CONTACT PLANNING**

Time is a most precious commodity, but in sales it's even more precious. Every minute we spend on a prospect who will not buy from us, is truly lost money. So, making a plan and using our time in the most effective way possible is key to success.

Before even picking up the phone or sending out an email we need to have a plan in place.

#### **Time is Money**

We hear that phrase all the time, but in sales it's an essential thought to keep in mind. But it's really not about activity, it's all about results. One of the reasons I love this profession is that it always provided me with a modicum of freedom and flexibility. Based on my personal experience and successes, it is not about how many hours you work, it's all about how much quality business you are closing.

## Planning is Everything

This part is where many salespeople go off the rails. Salespeople often start reaching out before they know their prospects' universe. That's when they start wasting time and not getting the results they are looking for, EVEN IF they are making 150 calls per day!!.

Salespeople who are effective, efficient and make a lot of money are the ones who know whom to target. I am not talking territory but about developing a prospect base that will buy from you. Territories are usually assigned to us, but within those territories we can develop a system to at first identify the low hanging fruit.

For example, if you are assigned Retail as a sector, you want to understand that industry and who within your prospect base would be a potential client. The goal is to identify parameters that will help you define those drivers. They could be revenue, or geography, but they could also touch on other areas. That's why it's important to understand what the drivers are that define a good prospect.

## Research is KEY

Another area where salespeople don't spend enough time is doing their *research*. There is an abundance of information available through on-line resources, but don't forget "old-fashioned" methods such as word of mouth, referrals, etc.

It is crucially important to invest a healthy amount of time on research. With decision-makers being inundated with information, coming from a place of expertise will make all the difference for your outreach.

Here's another personal example: when a salesperson calls me and they don't even know my business, have never visited my website and don't really have a clue of what my challenges might be, I simply DO NOT engage with them. And that holds true whether it's a telephone or email outreach.

I can tell just from glancing at an email if a salesperson is reaching out to me personally, or if they are simply working off a list - And I challenge you to be as critical.

## People Buy from People

As you are reading this book, this will surely sound familiar. “*People Buy From People*” – and I cannot say this often enough and I hope you cannot hear it often enough.

In this business environment where some salespeople think that marketing automation is the answer to their prospecting needs, keep in mind that buyers are getting smarter and smarter and they can identify whether you are targeting them as a person, or you just targeting a group of people hoping to get a response. There is value in content marketing and automated solutions, as long as they are relevant to your target group. In order to effectively engage with prospects, we still need to build rapport and trust. So, put yourself in your prospect's shoes, be personal, find out something interesting about your prospects, engage in a way that mirrors their behavior, make them feel comfortable with you and, ***most importantly***, BE RELEVANT. The danger in automation is that it is just that: Automated. One way to be different in this ever-changing business world is go to back to the basics and engage people in a meaningful way.

## Sales Is a Process

This is also a phrase you have most likely heard. If you have had any interaction with me, or you have read my blogs, I have said this many times before and I will say it again. Every salesperson needs to have a system in place that works for them, such as: utilizing their CRM, managing their time and developing unique messaging that will resonate with their audiences, just to begin with!

We can assume that far too many salespeople don't really have a strong grip on how to communicate what the unique value their product/service brings to a prospect. And far too often they rattle off a pitch (perhaps given to them by their company) and talk about the features and benefits rather than making sure that they have developed a relevant value statement for their audiences.

In a nutshell, when you know who your audiences are, when you can articulate your unique message and you know how to mindfully and effectively engage your prospects, you will succeed. Not only is ***Sales a Process***, it's also hard work. The good news is that if you do your homework and you follow a process, it will be fun and rewarding. Make sure that every single step you plan will lead to getting you closer to the sale.

### 3.3 BUILDING A PROCESS

So, how do you build that process?

First, make sure that you put a list together, ranking targets by likelihood to close. For example:

- a. Companies in your assigned territory where you have a successful use case
- b. Companies that are in an industry where your competitors have a stronghold
- c. Companies that you think could be a target, but you are not sure

Also, don't overwhelm yourself. You might want to choose about 20 - 25 companies each in the categories A and B and about 10 in category C.

Then you start researching companies in each category. You can do that by Googling, using search terms such as "Top companies in retail industry in New England", or use LinkedIn and their search engines to identify a solid list.

Once you have the list of companies compiled, you'll want to make sure that you find people you can connect with within those organizations. Personally, I use LinkedIn Sales Navigator, but if you don't have that tool, you can always visit the companies' websites or use the standard LinkedIn version, other contact tools as well as online directories and aggregators.

Prior to reaching out to your new list of potential contacts, you can help narrow your search by identifying the titles of the individuals you assume may be the decision makers.

Keep in mind though that titles can be misleading depending on the organizational structure. Your best bet is to read through the LinkedIn profiles to see what the responsibilities of these people are, in addition to their title. You might end up with a handful of people and that's OK. Start with the highest-ranking ones first (because you might get referred down as I had mentioned in a previous chapter) and work your way through the organization.

If you are a LinkedIn power user, you will want to see if you can connect with people that way. This gives you the ability to reach out through the platform, in case you don't have their email.

One way to search emails online is to simply put "Name AND Company AND email" in your search bar and sometimes you'll get lucky. Not always though. Make sure that the "AND" is always capitalized - that's how the search engines understand your search criteria.

One other thing which I believe is profoundly important, is that you should live by the mantra of ***"Say what you mean and mean what you say"***. In other words, and it can be



as simple as this: If you start reaching out by email and you promise to follow up the next day, you **NEED TO FOLLOW UP THE NEXT DAY!**

Everybody has a different way of engaging with people. Some like to call first, others like to email first and then follow up, and you should follow your own plan. But for everyone – here is what you need to remember: One or two touchpoints won't move the needle. You should plan to touch base at least 5 times over the course of 10 work-days using a similar message over and over (focusing on value).

Why 5 times in 10 days? Because we live in a business environment in which just about everyone gets inundated with information and **YOU** need to stand out. It's quite like advertising. We need to hear messages over and over in order to remember. Prospecting works the same way.

Another success tip is to make sure there is something in it for them. Ask yourself, why should a prospect read my email, or listen to my voicemail message for that matter?

Are you talking about helping **THEM** with their business objectives or are you just talking about the greatness of your technology or your products or your services?

While this might seem obvious, it's not. Most sales pitches are designed to highlight the advantages of the solution rather than helping the prospect understand how that solution could be of value to their life.

### **3.4 WHY IS REPETITION SO IMPORTANT?**

As I just mentioned, it's for very much the same reasons as in advertising. You want to make sure that you penetrate a person's mind with your messages. And by penetrate I don't mean that you aimlessly repeat the same thing (which some salespeople do) but you effectively ***craft a message that will resonate*** with your target audience.

In other words, you want to say the same thing over and over, using slightly different versions, changing the order a bit. We'll work on how to compose emails, voicemail messages and a script outline for your outreach in a later chapter.

### **3.5 HOW TO MEASURE YOUR EFFECTIVITY?**

Here's a really quite simple method to measure how effective your approach is. Craft two slightly different messages and divide your prospects into two groups.

20 – 25 of your A and B companies who get a “saving money” message, for example.

And the other 20 – 25 A and B companies get a “creating efficiencies” message.

Then you begin your prospecting, working the cadence (all the steps I will detail later) and you will see what brought you a greater response rate.

If you don't get a response after your fifth (or if your cadence is longer, your last) outreach, schedule them in your planner to reach out to them again in 6 months.

At that point, or sooner if changes in your prospect's world warrant it, start your outreach cadence afresh, AND be sure to alter it a little bit, adjusting to any new information or insights you have. Trust me, as much as we'd like to believe otherwise, they most likely won't remember you. We are not that important... and I say this with the humility years of experience has taught me!

So, in concluding, I ask you to take a moment and contemplate how FEAR has found its way into your work. How did you deal with it? How well were you able to support your buyers through the process if they had shown signs of fear? And, what will you do differently?

#### **Now thinking about your Call or Outreach Planning**

**What elements have awoken your interest?**

**What will you adjust and change?**

**And how will you plan your calls and outreach moving forward?**

**And please do let me know!**

Continue on the next page for your Chapter 3 Activities & Tasks Checklist.

**3.6 YOUR ACTIVITIES & TASKS CHECKLIST: CHAPTER 3**

Buyer's Fears, Reservations, Hesitations Checklist		
Your List of Prospects you Have Researched	Anticipated fears, reservations, hesitations	How You Will Overcome Them
1.		
2.		
3.		
4.		
5.		
6.		
7.		
8.		
....		
Planning Your Prospecting: Who are you're A, B and C Prospects & Why		
Prospects	A, B or C	Your Criteria

## 4 PROSPECTING – LIKE PANNING FOR GOLD

### 4.1 GET COLD CALLING HOT!

Cold Calling can actually be very exciting if it produces good results. If you follow a process, like the one I outlined in this book, AND you are doing your work every day, diligently, **NO excuses**, responses will show up in your inbox or on your phone.

One thing that's important to remember is that you need to be patient. It's not about your time frame, it needs to be the right time for your prospect. That's why it's important to give your prospect a way out by giving them permission to say “no”, or “not now”.

Some sales cycles are really long, up to 5 years and I can tell you from experience that I have worked some of my accounts for years until I got a response.

Appropriate and respectful perseverance pays off. I never gave up, always stayed in touch and reached out with relevant information, such as press coverage, events that will happen, research that I found.

If you are of value to your prospects, they won't view you as a nuisance. They will think of you as a trusted advisor, an expert in the industry and they will welcome to hear from you.

Salespeople who just call to call with no agenda other than to push their own products again are the ones who are dreaded by everybody. As a business-owner on the receiving end, I can **immediately** tell whether a salesperson is calling to sell something, or if they are actually interested in my business and trying to help. That's what makes all the difference.

### 4.2 STAR-POWER PROSPECTING RESEARCH

Research is key in today's sales environment. There are so many tools available that it's stunning that some salespeople still just pick up the phone and call or send an email that is replicated a thousand times.

Personally, I live on LinkedIn. It's the best resource for my business to have an impact. I can find people, build a great network, stay in touch with colleagues and be informed about industry trends.

I also publish articles on LinkedIn which elevates my reputation as a thought-leader and helps prospects and clients understand what I stand for and what I can bring to the table. Be careful though. Writing articles should simply showcase your expertise, it shouldn't be an advertisement for your business. People are smart enough to connect the dots, you don't have to rub it in their face.

### **4.3 WHO ARE YOUR PROSPECTS?**

As we mentioned in the previous chapter, part of a successful system entails to first identify who your prospects are.

Ask yourself while researching:

What are the challenges that they face?

How could your solution help them meeting their business goals?

Sometimes, it takes a while to read through all the articles that are available, to do research on an industry and to then research the individuals that we are targeting. I understand that and am fully aware of the investment, AND it will pay off in the end for you.

So, let's review my suggestions again:

- a. Make a list of about 50 prospects in 2 to 5 industries. Research each industry and then find companies that could be a good fit. Whether it's geography that drives your decision, or the number of employees, or revenue, or other drivers such as companies who struggle to succeed.  
In order to be effective and to make the most of your own time (remember, in sales time is money) you need to be as diligent, organized and (almost) as detail-oriented as an accountant.
- b. Collect your data in your CRM system or use the simple list from the Chapter 3 Review.

### **4.4 HOW TO BETTER UNDERSTAND YOUR PROSPECTS BEFORE YOUR REACH OUT**

So, how do you get a better understanding of your prospects, their challenges and goals before contacting them?

As I have mentioned (more than once I believe!) I live on LinkedIn! It is a great tool to get to know your prospects. It's free for the basic version, and really affordable if you want to dig deeper (and gather more information) and use SalesNavigator.

Oh, and by the way, no, unfortunately, I don't receive royalties from LinkedIn extolling the virtues of their application, LOL! It's simply a tech solution that has helped me grow my business. I wouldn't be where I am today without it. Even 15 years ago it would have been impossible to get connected with C-Level players as quickly and directly, to be able to write them InMails and to be on a level playing field with other providers who are not only larger, but also better known.

Social media (for all its downfalls), especially in a professional environment has helped us connect with people who we would have hardly had access to a decade ago.

My company has become a serious competitor to organizations which have been around longer, and some are actually publicly traded. Based on my published thought leadership and the ability to tell my story to CEOs and other C-level executives, my company has attracted clients such as FedEx, XPO, Atlassian, etc.

Why? Because the decision makers in these organizations are looking for the best suited solution to solve their challenges. So, if the "Shoe Fits", you are in business.

## 4.5 GETTING TO KNOW YOUR PROSPECT – LIKE DATING?

I am the author of the book ["Selling & Dating and Why They are Similar"](#) (available on Amazon). My observations led me to write that book. At the time, so many of my friends were chasing the wrong partners and it reminded me of sales where so many salespeople constantly chase the bright, shiny object, rather than doing the (sometimes tedious) work to research a good fit.

In dating, time is a factor and the same holds true for selling. The more time you waste on people who want to talk to you but will never buy (or only flirt with you and never want to commit, if you're looking for a partner), the less time you have for prospects who will become clients.

## 4.6 ALIGNING YOUR APPROACH WITH YOUR PROSPECT'S GOALS

Your prospects have clear business goals and they are eagerly looking for people to help them meet those objectives. If you are not in a position to solve an issue, you have no business talking to a prospect! It will be a waste of time for you and more harmful, a waste of time for a prospect.

When you do engage with a prospect who might be a good fit, remember to ask meaningful, relevant Open-Ended Questions. Good questions help uncover needs so you can gather meaningful information and to showcase that you have done your homework. They start with *What/Who/Where/When/How*.

Something like: *“What issues are you facing with your current workflow solution?”* would be an appropriate question if we go back to our original example.

You can also take the high road and ask: *“What do you like about your current solution?”*.

This may seem counterintuitive, but, try it out!

You'll see that this type of question usually prompts one or more positive responses. And, *if you simply listen and be patient*, you will also get information on what they **don't** like. This usually happens because that's how we human beings function. And then in turn, this information will help you frame your conversation.

## 4.7 CRAWL BEFORE YOU WALK – THEN WALK YOUR TALK

Always take small steps to get to where you want to be. Don't pack everything into your first phone call, it's overwhelming.

Start out with discovering the status quo and build on it.

When you engage with your prospect be prepared to ask lots of meaningful questions, but don't shoot them off like a machine gun.

Dig deep to illuminate for yourself and your prospect what they are looking for.

ALWAYS follow up in a professional, timely manner and spoon-feed information bit by bit until your prospect trusts you and is ready to buy.

For this, you also need to ask the “When” questions.

- When do they need your solution, when is their budget available, etc.?

Ditch your deadlines! The solution you create **MUST BE** on their time schedule, not on yours. Eagerness is a bad agent in sales.

## 4.8 WALKING YOUR TALK - OUTREACH EXAMPLES & TEMPLATES

Let me give you an example (and let's stick with the workflow optimization):

You want to get the attention of the COO (Chief Operation Officer) of a mid-sized manufacturing company. Your goal is to get a response from that person to either,

- a. book a meeting with him/her or
- b. get a referral to the person who is responsible for that area.

The following cadence is something that I have used for over a decade with great success. Now the key is not only repetition, but also **TIMING!**

Be sure to have no more than 10 business days between the first and the fifth outreach (as suggested here). You can only tap into people's memory when the intervals between each outreach are short, but not too close – that could become annoying. You want to find that balance between creating a positive memory and being annoying and of little value.



Keep in mind, we all get inundated with information and for somebody to remember you and the message you are trying to communicate, it is important to stick to this recipe:

### **Repetition + Short Time Frame**

And here's another tip: Be confident and don't be hung up on the fact that your prospects should remember the company you represent. Far too many salespeople place too much importance on this at this stage. Unless you work for IBM, SAP or any of the other very well-known brands, people generally don't care. What they care about is “What's in for me/ for my company/goals/ etc.”.



**Here is one sequence with five outreach examples/templates to COO for you to use, to modify, to alter and add your own sparkle**

**1. First Outreach – Email**

Subject Line: Discussion to Optimize your Workflow

Body:

Dear xxx,

My intent was to schedule a quick introduction call to provide an overview on how we partner with organizations, such as xxx to help **them create efficiencies** (*remember! CCOs are in charge of streamlining the organizational processes, so that's a value to them*) with our solution that optimizes workflow processes.

Our clients are manufacturing companies (this will resonate with somebody who is in the same industry) who want to save money and time while streamlining their procedures.

I will call you tomorrow to touch base, but in the meantime, feel free to email me with questions, or call me at xxx.

Best,

**2. Second Outreach – Phone Call**

Now, you want to put your money where your mouth is and follow up on your promise to call.

**a. Scenario Live Call:** when you actually get that person on the phone:

Hi Mr/Ms. xxx. I sent you an email yesterday, not sure if you remember. Is this a good time to quickly follow up?

My intent was to see if you are open to a quick conversation on how we partner with organizations in your industry to help them **create efficiencies** with their processes and workflow. Depending on the response, you can then take it from there.

**b. Scenario Voice Mail**

Hi Mr/Ms xxx. I am following up on an email that I sent you yesterday and I indicated that I would check in today. My intent was to schedule a time to provide some insights on how we work with companies in your industry to help

them **create efficiencies** in their workflow processes. Please let me know if you are open to quick overview, I am certain it will be a good use of your time. You can reach me at xxx or my email xxx.

### 3. Third Outreach – Email

Subject Line: Checking in – Workflow Optimization

Body:

Dear xxx,

The other day I sent you an email about our Workflow Optimization solution and I also left you a message. As a reminder, we partner with organizations in your industry to **create efficiencies** that will eliminate human error. As a result, our clients save money and time on cumbersome tasks that could potentially lead to missed deadlines or delayed invoices (***NOTE TO YOU, THE READER: Make them aware of the consequences of NOT working with you!***)

Your time is precious and I'm aware of that, so please let me know if you are not interested in talking to us, I wouldn't want to waste your time. Again, my telephone number is ...

Looking forward to hearing from you.

Best,

### 4. Fourth Outreach – Phone Call

**Scenario Voice Mail** (at this point, you have either had spoken to them on the phone at some point, or you need to keep trying)

Hello Mr/Ms xxx. It's xxx again attempting to get your attention.

I've sent you a couple of emails to see if you are open to a quick phone connect to discuss our solution could streamline your workflow processes and **create significant efficiencies**.

If you could give me the courtesy of a call back that would be greatly appreciated, as I really wouldn't want to waste your time.

Looking forward to hearing from you. You can reach me at xxx.

5. **Fifth Outreach – Email** (this is the last email that gives them a way out)

Subject Line: Gently touching base....

....as you haven't responded to my previous outreach. Please feel free to let me know if you are not interested as I wouldn't want to bother you. My intent was to schedule a quick conversation to help you understand how our clients work with us to **create efficiencies** in their workflow process.

Please let me know when we can schedule a time to connect.

Thank you,

XXX (your name).

If you receive a response stating they are not interested or no response at all, you can restart your outreach in 3 to 4 months again. And remember to update your content!

Checklist: Top 50 Prospects & Their Challenges/Possible Needs			
Name	Company	Position	Challenges/Possible Needs which are Aligned with Your Solutions
1.			
2.			
3.			
4.			
5.			
6.			
....			
...			
<b>Practise &amp; Improve Your Questioning Skills:</b> <b>For Each Prospect Create 3 - 5 Questions which Start with at LEAST</b> <b>three of the following: What/Who/Where/When/How.</b>			
Prospects	Your Questions		
	1. 2. 3.		
	1. 2. 3.		
	1. 2. 3.		
	1. 2. 3.		
	1. 2. 3.		
	1. 2. 3.		

<b>Practise &amp; Improve Your Questioning Skills:</b> <b>For Each Prospect Create 3 - 5 Questions which Start with at LEAST</b> <b>three of the following: What/Who/Where/When/How.</b>	
<b>Prospects</b>	<b>Your Questions</b>
	1. 2. 3.
	1. 2. 3.
	1. 2. 3.
	1. 2. 3.

## 5 HOW CAN REJECTION BE YOUR SECOND-BEST OPTION?!

Nobody wants to be rejected and it hurts in the beginning, but once you realize that “no” is your second-best answer, because it weeds out the people who are not interested in working with you, you will get used to it. It’s almost like jumping into cold water, it’s hardest the first time around.

### 5.1 WHY “NO” IS A GOOD ANSWER

Always keep in mind that “No” is the second best. The most successful salespeople are the ones who know when to push and when to let go. Not everyone we reach out to is a good prospect and understanding that is key to effective prospecting.

The earlier you invite a “No” the better you are off managing your time. Remember, time is money and in sales that saying rings true even more.

There are many ways to identify a good prospect and to weed out the bad ones. First off, if you carefully paid attention and read the previous chapters you have done extensive research before making the first phone call or sending your first email. But even if you are lucky and your prospect responds and engages, that doesn’t mean that they will buy from you.

### 5.2 IS THAT “NO” FOR NOW OR FOREVER?

Sometimes, “No” means “No, not now”. Timing plays a big role in your prospects world and you need to determine that. Is it not a good fit, or is their budget not available? Ask those questions and you will be able to distinguish.

### 5.3 TURNING “NO” INTO MAYBE

When prospects say “no thanks” they often don’t have the time to talk at that moment, or they don’t care enough. Ask if you could send them something (ideally a case study) that they can review and when you send it make them aware of the consequences of NOT working with you. For example, if you are selling the Workflow Optimization Solution you could ask them how many times they missed a deadline in the last year due to internal miscommunication.

## 5.4 KEEP BUILDING BRIDGES

Even if people don't want to buy from you in the short term, keep them engaged and make sure that they remember you in a positive way. You never know, they might change their mind based on something that happens within the organization or they could move on and work for another company.

People remember how you treat them and if you are respectful, courteous and consultative without pushing for something that your prospect might not need at that point in time, you will be remembered as a helpful person, rather than somebody who is in sales.

## 5.5 THE LONG & WINDING ROAD

Allow me to share an example. One of our specialization verticals is sales training for the transportation and logistics industry. I began prospecting a subsidiary of one of the world's largest logistics companies at the end of 2013.

Using my own advice which I have been sharing with, I started at the top and reached out to the (female) CEO on LinkedIn who referred me to the Head of Learning & Performance. I established an excellent relationship with her and collaborated on developing proposals for two different training scenarios over the course of the next four months. Our prospect had informed me that they were working through a number of different initiatives at the time and sales training was not their top priority.

So, in late spring of 2014, when they said they were not going to move forward, was I to take that as a "No, not ever"? Or a "No, sorry, not right now, but perhaps in the future? As you can probably guess from reading this book this far, I'm a strict believer in always adopting the "No, sorry, not right now" mindset! Especially in this case, as our prospect did NOT inform us to never ever contact them again!

### **So, what do I do at this point?**

In a planned sequence of outreach emails and phone calls, I shared information and insights we gathered on their competitors' successes, failures and activities in sales training and personnel development.

Using industry aggregator websites, LinkedIn, and Google Alerts as my sources of information, I was able to share news and developments with them often before they heard it from other sources. I also shared my blogs and newsletters (Remember: establish yourself as a thought leader!).

Additionally, at regular intervals, I inquired what initiatives they were contemplating in regard to sales training.

Using the same sources as well as their own website, I was able to follow happenings at their company, for example, calling and congratulating my contacts on their work anniversaries or announcement of projects they were leading or other initiatives where their names were mentioned.

**So, how do long can this go? My answer: As long as they stay engaged!**

One year and five months later, we were asked again to develop a new proposal for sales and service training, and one month later we were approved and added to their vendor list, which I'm sure some of you know is often required with large, publicly-held companies.

***Did we begin training then? ... NO!***

It took another four months! We re-worked the scope of work, the training content and the training delivery formats. The training project finally began in April of 2016 – **two and a half years** after first reaching out to our client!

This is an example of how thought leadership, professional perseverance and consistent messaging will lead to success.

## 5.6 REVIEW EXAMPLE: PLANNING TO KEEP BUILDING BRIDGES

Here's an Example of How to Set up an Information & Outreach Schedule for each prospect who has informed you they are not interested or ready to move forward now. Your best bet is to have this information in your CRM with send-out reminders.				
Prospects	F-Up Outreach Email/Phone What shared/ When?	F-Up Outreach Email/Phone What shared/ When?	F-Up Outreach Email/Phone What shared/ When?	F-Up Outreach Email/Phone What shared/ When?



## 6 MAKING YOUR CASE – PUTTING YOUR PROSPECTS ON A PATH TO SUCCESS

You need to make sure that you guide your prospects on a path where you make the case as to why they should be partnering with you.

### 6.1 TAILORING YOUR SOLUTION – BETTER QUESTIONS?

It is your responsibility as a salesperson to help your prospect understand how the product/solution that you are selling will be of value to them. Most people don't know what they don't know, so you need to guide them to understanding. In order to do that, you want to ask as many questions as possible, so you gain insights into their world. Ideally, you want to ask **Open-Ended questions** that start with *What/Who/How/When/Where*.

For example, if you want to know how many people are involved in making this decision, you might say: *“Who else will be involved in the decision-making process with your organisation?”*

You also want to gauge the time-frame of when they want to launch a solution. You could ask a question such as: *“Once you have made a decision on what vendor to move forward with, when do you want to start the project?”*

Make sure that you know if budget is available and also ask them what they currently do to manage process because that will give you insight on how your solution could fill potential gaps.

### 6.2 HOW DO YOUR PROSPECTS COMMUNICATE BEST?

There are different communication styles that people use, and the graduates of our Consultative Sales Certification Program understand and can apply that skill.

Some people are more visual, some are more auditory and others more kinesthetic. But what does that mean?

Have you ever experienced a situation where you sent one email after another without any response and as soon as you left a voicemail that person called right back? That is because some people are auditory, that is, they respond more naturally to verbal communication versus written.

The opposite holds true for visuals. For example, you might leave a few voicemail messages and they then respond with an email! They have a preference for visual communication and generally prefer to see emails, PPT slides, brochures before engaging verbally. They prefer to look at something.

And then we have people who we call kinesthetics and they prefer a hands-on experience as they want to touch things.

In other words, we could sum it up with the differences between *Sight, Sound and Touch*.

There is no right or wrong as it's the way we are wired. And when we pay close attention, we can figure it out, much to our advantage and to that of our prospects. They will feel more comfortable with you and will be more likely to want to engage with you again.

### **So, how can you figure this out?**

Visual people often use words such as "I can see that" or "Let me have a look" or "That looks good". Auditory people use phrases like "I hear what you are saying" or "That sounds good." Kinesthetics might say something like: "My gut feeling tells me" or "I think I have a good handle on that."

There is a whole world of science and discussion around this, so we'll stick to the basics for our purposes. You will see when you do pay attention, you'll understand its importance when you want to communicate even more effectively. Therefore, be aware of using visual presentation and communication for a visual person, speaking and engaging in conversation with a verbal and creating hands-on experiences for a kinesthetic.

## **6.3 SHARING YOUR SOLUTIONS ON ALL CYLINDERS**

Ideally you want to use a multi-pronged approach where you know who your prospects are, you identify their communications preference and you connect with them in various ways, firing on all cylinders. Always try to get connected on LinkedIn and then test emails and phone communication to see what sticks.

## 6.4 IT'S WIN-WIN TIME – GETTING THE FINAL COMMITMENTS

If you create a win-win situation where your prospect will benefit from your solution and you ask for small commitments along the way, you won't have to ask for the final "yes" in the end. It will come naturally. You want to build a path to success.

When reviewing a proposal with your prospect, ask questions such as

“If we are able to deliver what is outlined in the proposal, when can we start the project?” Questions like those give you insights into where you are in the process. If the prospect’s response is “Oh no, we are not even close to considering this”, you have to go back and see where you missed a step.

## 6.5 REVIEW: UNDERSTANDING & QUESTIONING TO GAIN COMMITMENTS

[illegible]

## **7 WHAT IF THE SHOE “DON’T FIT”! \*\* ARE YOU WITH THE RIGHT ORGANIZATION FOR YOU?!**

Now, let’s talk a little bit about **YOU** and the organization that you work for and align yourself with. It might be a good fit, and, unfortunately, sometimes, you might find out that it’s not a good fit. Then you might consider moving on.

So, how do you go about making that decision?

### **7.1 IS IT A GOOD FIT? WOULD YOU SELL SOMETHING YOU CAN’T DELIVER ON?**

It’s not always easy to determine whether joining (OR prospecting for) a new company or organization will be a good fit for you.

You might encounter companies painting colourful scenarios and verbally promising certain outcomes when they are recruiting only for you to be disappointed with your situation once you are on board.

Attempt to be as mindful as you can of who you work for as you are when prospecting. You will want to ensure you can and will protect your reputation going forward. As you can imagine (or have even experienced) this is especially important when you specialize in selling to particular industries and you have become an expert in those fields.

### **7.2 HOW DO I KNOW WHAT THE FUTURE WILL BRING?**

For starters, I have found great success in asking my former managers plenty of questions about process, products, development, competition, etc. and challenging the status quo. If sales management is not willing or open to feedback and innovation from their sales team, the likelihood that products or solutions won’t improve is most likely high.

After all, salespeople are the ones talking to customers and prospects every day and their experience should be incorporated in the overall strategy. Also, if your sales manager is a

“yes” man/woman and is not able to stand up to their direct reports you probably will have a harder time succeeding.

### **7.3 CAN YOUR ORGANIZATION REALLY PROVIDE WHAT YOU’RE SELLING?**

I know, it sounds like a strange question, but unfortunately, I have seen it more often than I have ever wanted to! It should be in Ripley’s “Believe It or Not!” There are organizations and companies which can’t actually sell what they advertise and/or promote!

Think about this! What kind of precarious position would that put you, as the salesperson, in?

You would best be advised to either make sure that the situation is remedied very quickly or that YOU have an exit strategy.

### **7.4 HAVE A GOOD LOOK BEHIND THE CURTAIN**

Albeit, nothing is perfect, and every solution or product has some kind of challenge. This is all the more true in our technology-enabled environment in which an ever-growing number of companies sell products and services which include data, AI, Machine Learning, etc.

Your best bet is to ask as many questions as possible before you join any organization and attempt to interview co-workers and/or customers before you align yourself with a brand. Again, you need to protect your personal brand as well. Once you sell a flawed product or solution to a trusted prospect, your name might be stained.

### **7.5 IS OVERSELLING AVOIDABLE?**

What may often happen in sales is the (in)famous overselling. Let’s be honest, we salespeople don’t like walking away from a sale, so we might start promising things that our company can’t really deliver on. Some salespeople might even end up selling a product or solution under false pretence and these incidents never result in a happy client relationship.

You want to make sure that you can deliver what the client is looking for. If you can’t, be honest about it. Let me give you an example of how you can manage expectations.

When I sold PR Research some 20 years ago, one client, let’s call them “XYZ”, wanted us, the sales team, to include every single publication on the planet in the analysis. Maybe I should explain first what PR Research was at the time. It was a way to look at and analyse print publications (newspapers, magazines) by extracting information which included a client’s company name or their competitor.

*For example, GE Appliances was one of my clients. They retained us to monitor press coverage that mentioned GE Appliances and competitive products. Back then, it was quite a cumbersome process (before social media and automated web content analysis and AI).*

We had a whole department of people cutting out articles from newspapers and magazines, then another room full of people reading the coverage and entering it into a database and then yet another group of researchers analysing the data.

All of this today happens in a highly automated fashion using AI and algorithms, but that’s how it was done 20 years ago. Imagine the labour costs of having people read, clip, and analyse so much print media! So, to think that every single print coverage in the world would be included was quite ambitious and truly cost prohibitive.

## **7.6 SELL WHAT YOU CAN DELIVER – AND MANAGE EXPECTATIONS!**

Continuing with the “XYZ” client example above, I reached out and had a conversation with my client explaining what we could do well and what couldn’t. It would have been impossible to monitor and analyse all the print publications in the US let alone the entire world. We needed to be selective just as is the case in market research sampling. For those of you who know about market research, sampling was what everyone was used to seeing.

When we see a USA Today poll stating that, for example, 75% of Americans believe that the economy is in trouble, we know that they did not actually question 75% of all Americans. That would be over 200 Million people! Rather, it’s a statistical sample that is being used to provide us with those results.

Before heading out to meet with my client, I invited one of our Account Directors to come along. Together with the client, we then decided on the key publications that would be included in the analysis. This not only made sense from a cost perspective, but we also knew that we probably wouldn’t find relevant news coverage for their household appliances in Sports Illustrated or People Magazine. Once we worked with the client through that process and explained our reasoning, we were able to manage their expectations. There was

no confusion or push back on the “limited” media inclusion. Would we be missing some coverage once in a while? Probably. But did it matter for a statistical representation? No!

Imagine if we would have not gone through this planned process of managing expectations? There are two potential scenarios.

In the first case scenario, we would have just included everything, and the proposal would have been \$1Mio instead of \$150,000. The client probably would have never called us back because we exceeded their budget.

The second scenario could have been that we simply wouldn’t tell the client that we would cut down the publication list and “misled” them about it.

But what if the client had read something about their appliances in a random publication that we hadn’t included and then discovered that it wasn’t included in the analysis? That’s just bad business.

In my opinion, people are generally reasonable if you give them a choice and you are being honest about it. They actually really appreciate it.

*Nobody wants to be sold to and nobody wants to be lied to, either.*

We are all grown-ups with needs and expectations, but we also generally know that there are always some compromises we have to make. That’s just life. Life is all about a “give and take”. It’s knowing where and how to collaborate, compromise and reaching consensus it that makes for good relationships in business (and in dating, too!).

## 7.7 REVIEW: WHAT YOU’RE SELLING & HOW YOU’RE MANAGING EXPECTATIONS

What Products & Solutions You Are Selling?	How Are You Managing Your Client Expectations?



## 8 DELIGHTING YOUR CUSTOMER: UNDER-PROMISE / OVER-DELIVER

Here is the motto which I have been living by ever since I entered the sales world: *“Under-promise and Over-deliver”*.

### 8.1 IS UNDER-PROMISING & OVER-DELIVERING THAT SIMPLE?

It really is when you are with the right company and you work with the right people. There needs to be consensus amongst management and sales teams.

Here's an everyday example: If a prospect asks for a proposal to be completed and delivered by next week, don't promise to deliver it if you know it's not going to be possible.

Consider all the other teams that have to help you in order to get a proposal out the door. Check with them FIRST before confirming a deadline.

You will be respected for the fact that you are diligent and cautious rather than reckless and late.

The very fact that I promised myself to always live by that motto helped me to be successful in sales. We must avoid being viewed as salespeople who promise the world to then fall short on their promises.

If you can project an image of top professionalism, it will not only help you build trust, it will show in your sales numbers because people like to buy from people they can trust.

### 8.2 PLAN FOR DELIGHT

Customer Satisfaction is not only about delivering what people expect but going beyond to truly help your prospects and clients be successful. Whether that means providing your personal cell phone, so a prospect can text you when necessary or working on a weekend. While I am a big proponent of honouring a Work/Life balance I also know that some industries require a more immediate response and once you have established a trust relationship – albeit with healthy boundaries - your prospects will not take advantage of it.

### **8.3 BEING A FUTURE-PROOF PARTNER**

You want your clients to be able to trust you so they will keep you in mind when making business decisions. Make sure that you build a relationship where your business partners (because once they are clients, that's the way that should view you, as a PARTNER) always come to you with questions, concerns or recommendations whenever they have a challenge in a space that you cover. Ideally, you want to help your clients grow their business while you grow your own book of business.

### **8.4 RAISING THE BAR & HELPING GROW YOUR CUSTOMER'S BUSINESS**

And you can do that by making it a standard part of your daily activities - always looking out for your clients. You could(should) set-up Google alerts with your client's names, the industry they operate in and their competitors, so you know what's going on in their world as soon as they do.

Sometimes, if you are lucky and you dig deep, you might even know something before they do. That's another way you build trust even deeper.

## 9 CONCLUSION – THIS IS JUST THE START!

In closing, let's be honest and state: *This is just the start of your journey!*

Life is full of surprises and so is the sales world. This book would have had very different content just 5 years ago, but buyer journeys and capabilities are changing so rapidly that we need to stay fresh, current and curious in order to be successful.

The only way to do that is to never stop learning and to adjust and adapt our approach based on the current circumstances.

Having said that though, I also feel that technology should not be a tool to circumvent traditional outreach techniques. There is still immense value in picking up the phone and in meeting with prospects and clients in-person whenever possible although this might also change forever due to the 2020 Pandemic. Now is probably the time to understand that meeting people in-person needs to be replaced by meaningful remote engagement, but that might be another book to write.

The fact is and will remain: People buy from People! And this will never change, regardless of how technology evolves.

So, what are you waiting for? Start your Journey, become a trusted advisor, be better than the average salesperson.

*Listen more than you speak, ...*

*Ask meaningful questions, ...*

*Lead with value and ...*

*Under-promise and over-overdeliver.*

And off you go!