Sales Call Clinic

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Did it take you longer to dress for your sales call than it did to prepare for it? Successful salespeople recognize where their customer is in the decision-making process, and address what's most important to the customer at each point.

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ABOUT CPS. Critical Path Strategies helps clients improve the effectiveness of their sales organization. Our portfolio of services addresses the strategic, organizational, and relationship issues that impact selling performance. Our powerful processes enable clients to transform their sales culture, enhance their competitive position, and accomplish strategic business initiatives. Our clients—emerging companies and members of the Fortune 500 alike—typically measure 100 to 500 times their CPS investment in revenue growth.

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Role-based Messaging:
An Important Component of the Selling Effort

by Ken Evans

At CPS, we find the work we do to be rewarding and exciting. We believe selling is one of the most intriguing vocations and are fascinated with the personalities and techniques we observe. Everyone relates to "selling" and "buying" - we do it every day. We experience both good and bad interactions and customer service and have formed opinions about what differentiates a "good" salesperson. One best practice we have observed from outstanding salespeople is their ability to frame their offering specifically to the needs of the individual buyer. The offering may be the same, but its presentation to different people in different roles is customized to the individual. We call this best practice "role-based messaging."

CPS has observed that sales professionals who proactively and deliberately create individualized messages for their most important clients consistently experience a significantly higher success rate in identifying and closing major transactions.

As familiar as we are with conducting trade on a routine basis, sales is often considered an art versus a science, a profession in which no equations exist that guarantee success, yet where failure can be accurately predicted when certain elements are missing. At CPS, we talk a lot about trust. When trust-based relationships exist, the ability to conduct trade increases dramatically. As CPS partner Mary Ann Costello often emphasizes when coaching sales professionals, "All things being equal or even close, buyers prefer to buy from people they know, like, and trust." We understand that value is a function of what a buyer is willing to pay and a seller is willing to accept and is determined by individuals. Yet even in understanding that value is truly personal, incredibly, we often fail to articulate value in a way that is relevant to our listeners/buyers.

Stop for a minute and think about the selling messages that barrage all of us on a daily basis. We hear messages to buy different types of technology, cars, insurance, real estate, and over-the-counter pain relievers. In our jobs, we receive emails from customers, our bosses, our friends, our business colleagues, and other senders. If you counted up the number of businesses trying to get your attention, would the total approach 250? 500? How does one filter through it all to get at what's most important? Research suggests that we respond only to what is personal and relevant to us within a timeframe that is meaningful.

As sales professionals and communicators, it is clear that to cut through the clutter and be heard, we must establish a personal mandate to consistently strive to articulate value in a personal, relevant, and time-sensitive fashion.

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Over the years, CPS has observed that sales professionals who proactively and deliberately create individualized messages for their most important clients consistently experience a significantly higher success rate in identifying and closing major transactions. In our work with them, CPS has documented a straightforward process that may be used to create value-based messages that address the specific needs of individual participants.

Let's review how this might work in a simplistic and hypothetical selling scenario. Suppose that you are interested in selling implementation services to a large customer. In working with the client, you've learned that providing implementation services for a planned application will ultimately result in an annual savings of $5 million to the business. One might think that a message about the company savings might be compelling to all. Yet it is important to step back and think about who is involved in the decision-making process. Would the value to the CEO be the same as for the CFO and a Technical Manager? Probably not; we might find the following nuances are important:

For the CEO	Our ability to provide high-impact implementation will help you address your critical need of global capability. The primary benefit to you will be speed to market.
For the CFO	Our ability to provide lower-cost implementation will help you accomplish your critical need of lower overhead cost. The primary benefit to you will be the ability to preserve cash for other projects.
For the Technical Manager	Our ability to provide training for end users will help you accomplish your critical need of technology usability for the lines of business. The primary benefit to you will be increased satisfaction of key line-of-business executives in your company.

The benefit to the company doesn't change; the savings will be recognized at an aggregated level. What is different is how we deliver the message and personalize it to ensure that our value contribution is heard and internalized by our listeners. When we remember to fine-tune our messages so that the listeners can immediately grasp the relevancy to them, we not only increase the probability that our messages will be heard, but we also build confidence that we understand their business and their individual pains.

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Planning Your Call

by Mike Morton

The simple process of "Planning Your Call" will keep you and your team on track during customer encounters. It will be well worth the 5- to 10-minute investment of time, as it will result in more productive calls for you and your team.

We often fail to realize the true importance of spending little, but critical time, to actually plan our sales call. The CPS Call Plan is part of our methodology that enables you to get the most out of your sales calls.

What do we normally do when we decide to make a high-level customer call?

We worry about the time and the team who's going to be there and the moods of the customer team and what your team is going to say—or not say. What if we do a little planning for that important call you're making this week?

A common complaint today is, "*I don't have enough time*." Consider the executive you are calling on and how little time he has. I heard the term "negative time" recently. While we haven't figured out the time machine yet, call planning WILL generate time. Time for your customer—a defined agenda, and time for your team—no missed items on the agenda, no mis-representation or surprises, no promises that you are unable to keep.

A Five-Step Call Plan

Determine your primary objectives. What objectives, if met, would make this call an extraordinary use of your time and your team's time? Every objective has to have demonstrable value to the client. If you can articulate it this way, you can achieve your objective.

Secondary (back-up) Objectives. If you are on a roll, or if you get shot down, what else could the customer do for you today? Provide information, leads, competitive positioning, and many others. Plan for these *secondary objectives*; they *are as important as your primary objectives*.

Gifts. Do not just ask for commitments from your customer. Every time you make an important customer call, bring gifts. These are not gifts that necessarily have monetary value, but that are of high value to the person receiving them and reflect thoughtfulness on your part. Some examples are business information, problem-solving, perspectives, and ideas—even just listening. Where do gifts fit in? Early, late, or an after-thought; make every gift a surprise.

Good Questions. When do we think of the best questions to ask? Too often, it is when we are driving away, or when your team asks, "Did you ask her …." Spend some time understanding what you and your team need to know from this customer. Develop four or five good questions that you will ask during the sales call. Remember, "The quality of our knowledge is based on the quality of our questions."

Openings. Who is going to open this call and how? Most people start here...and end here. It is important to find out by asking, "How much time do we have for this sales call?" Plan on introducing the agenda or objectives for the sales call. Determine the style of the executive you are calling on and let them run the call or take charge, but hit the bulls-eye for "their needs." Practice the Platinum Rule *"Do unto others as they would have you do unto them."*

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