A Multifunctional Approach to Accelerate the Complex Selling Process

A Holistic Business Development Journey

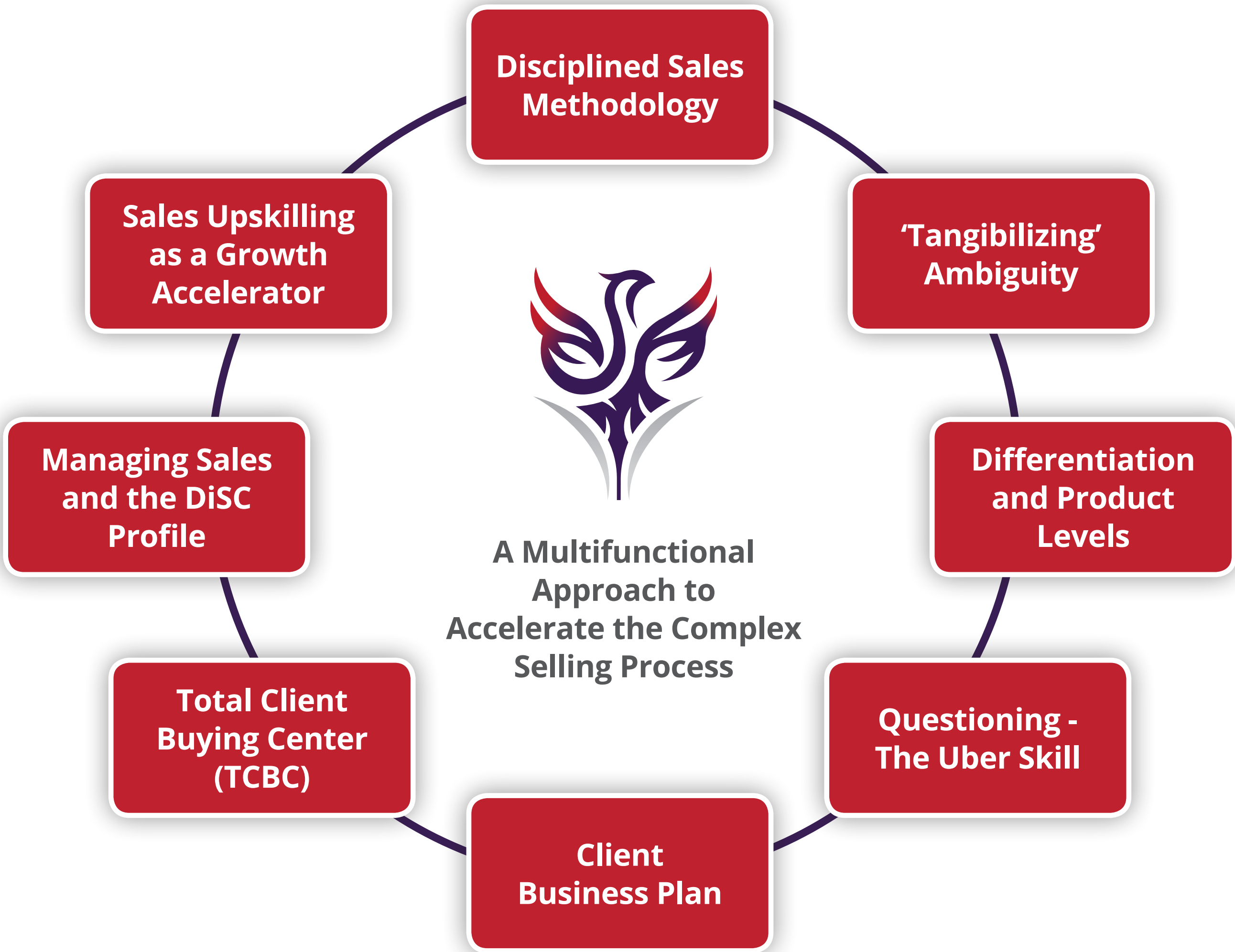
Joanne Flynn

Founder, Phoenix Strategic Performance

MAKING HUMAN CAPITAL
A STRATEGIC INITIATIVE

phoenix strategic PERFORMANCE

TABLE OF CONTENTS



INTRODUCTION

The best sales strategy can fail at implementation without a disciplined sales methodology supporting it. In sales, the results can be immediate and dramatic. But the relationship sales process is not a simple line from A to B. It involves a multi-dimensional understanding of the many layers of the complex sales process. We have outlined these many layers of interconnected threads that weave together a strong sales fabric.

Successful relationship selling is not just a list of activity items. It is a thinking person's occupation, requiring a plan, a process with targets and smart activity, together with integrated skills measured against the only metric that is an indicator of success – The Client Business Plan.

Benchmark and assess the current state of your sales team. Identify and close any performance gaps. The result will be a strategically-aligned sales team that will accelerate growth and create value.

Because we are focused on WHY and HOW client information, the sales methodology approach is multifunctional, requiring a constant analysis of simultaneously layered information.

6-Step Approach: Increase the Probability of Sales Success With a Disciplined Sales Methodology

The best sales strategy can fail without a disciplined sales methodology supporting the strategy. In sales, the results can be immediate and dramatic. Today, a surefire way for an organization to accelerate growth is through the sales and business development function. It is a strategic imperative to ensure that the sales team is robust and armed with the most relevant, competitive knowledge and skills to compete in the marketplace.

With over 35 years of sales and business development experience consulting with the largest global financial services firms, Phoenix Strategic Performance (PSP) has developed an approach and business development / sales methodology to provide the all important WHY and HOW information necessary to drive complex sales and accelerate growth.

Because we are focused on WHY and HOW information, the sales methodology approach is multifunctional, requiring simultaneous overlays of information.

CONVENTIONAL WISDOM

Sales and business development is often measured in terms of activity. With enough activity, there will be increased productivity. But is there really a straight line that goes from activity to productivity? In the world of complex sales, those sales that take a long time and deal with complex buying centers, there is often not a direct correlation between activity and productivity. If there were, life would be so simple and sales productivity would be through the roof.

THE WHAT INFORMATION

Today, there are a variety of CRM and sales tracking tools available to capture information about what salespeople are doing. The operative word is WHAT – the quantitative sales picture. This is important and necessary information, but it does not give us the full picture. For peak performance and high sales productivity, we need both the WHAT, WHY and HOW information which adds the qualitative information that is necessary to manage complex sales.

THE PHOENIX STRATEGIC PERFORMANCE APPROACH – THE WHY AND HOW INFORMATION

6-Layer Approach

1. **Layer One:** Determine the Market-Driven Strategic Business Development Landscape
2. **Layer Two:** Benchmark the Ideal Sales / Business Development Role & Determine the Required Competencies
3. **Layer Three:** Determine the Ideal Personality Profile of the Salesperson (DiSC®)
4. **Layer Four:** With CRM / Tracking Information, 'Dimensionalize' the WHAT Information
5. **Layer Five:** Set Sales Goals and Targets to Proactively Manage the WHAT information with the HOW and WHY
6. **Layer Six:** Hire the Right People from the Start with Role Benchmarks and Personality Profile Assessments

Tangibilizing© Ambiguity: 2 Challenges Facing Your Sales Team

If you can't define it – you haven't 'tangibilized' it.

Increase the Probability of Sales Success With a Disciplined Sales Methodology

You might be wondering what 'tangibilizing'© means. *'Tangibilizing' is the process of taking ambiguous language, and through the questioning process, precisely defining the terms. You can then completely describe the client situation with concrete, defined, specific data.*

THE BASICS OF THE RELATIONSHIP SALES PROCESS

In the relationship sales process, clients want you to be a confidante and resource who both understands and is working to help solve their business challenges. They are looking for someone to provide advice and partner with them, moving up the trust ladder together. They don't want to feel like they are 'being sold'! ***(Clients can definitely tell if you're there just for a quick sale.)*** If you want to succeed at relationship selling, everything about your approach must reflect this proposition.

CHALLENGE #1 - THE COMPLEXITY OF AMBIGUITY

Relationship selling is a complex process due to all the potential ambiguity and assumptions involved. This ambiguity stems from salesperson's assumptions together with a lack of clarity, understanding and direction from the client. So what do salespeople tend to want to do? Very quickly simplify the complexity into a paradigm the salesperson can process – the shift from a client to a sales focus. What's the problem with this approach? In speeding up the process, salespeople can oversimplify the intricate nuances unique to the client, understanding only the most shallow level of client information. In effect, salespeople have made the client generic defined by the salesperson's operating context. The client become a commodity. This results in making the client base generic, without client-specific definition. A client once said, "If you treat me like a commodity, I will pay you like a commodity."

(cont'd on next page)

Tangibilizing© Ambiguity: 2 Challenges Facing Your Sales Team

Those are very powerful words every salesperson should continually consider. Relationship selling requires salespeople to gather information at the deepest and broadest levels. This information gathering is not a superficial or quick process.

Achieving Mindshare

Information gathering focuses entirely on:

- What are the client's business issues and their business challenges?
- How does the client see their business today?
- How does the client define their business in the future?

By understanding this information at the most detailed level, in the client's words, salesperson and client achieve mindshare. The salesperson is fully able to understand how to bring value, solve problems and help clients meet and anticipate business challenges.

CHALLENGE #2 - CLIENT INFORMATION FROM THE CLIENT'S PERSPECTIVE - THE ART OF 'TANGIBILIZING'

At this stage, we are not talking about selling, pitching or presenting your product. This part of the relationship sales cycle is all about the client. It's all about how well you ask questions about their business and how well you listen to and process the information. ***Information at this point is everything.***

However, the information the client gives you can typically be very ambiguous. The client knows and understands their business, but is not necessarily skilled in explaining the relevant information in a linear or clear way. ***(Appreciate, it is very linear and clear to them since this is their daily operating world.)*** So this makes understanding the details of different businesses a challenge. As a sales professional, you may be hearing a lot of confusing and conflicting statements together with company code or jargon to straightforward questions. The challenge for the sales professional in relationship selling is to use every skill to clarify this ambiguous information into the most tangible information possible. We call this the process of 'tangibilizing', when you can completely describe the client situation in concrete, defined, specific terms. This level of detail should ultimately be recorded in both a CRM system and in a Client Business Plan.

This is 'Mission Critical.' Any wrong or assumed information at this stage will create 'follows errors' during the following stages. Misunderstanding the client's problems, issues and operating 'hooks', will make it difficult to position your product with problem solving and competitive impact. There is no room to tolerate ambiguity, code or assumptions in relationship selling. The goal is to establish complete, tangible and specific knowledge of the client – to achieve 'mindshare'. This is the role of the sales function, not the responsibility of the client.

Differentiation and Product Levels: The Make or Break Sales Skill to Wage the Sales Battle

3 steps to matching & positioning product for maximum impact

1. IT'S ALL ABOUT THE CLIENT

When a client has a problem, issue or 'hook' requiring a solution, they look for one thing - simplicity. They are looking to "break-down" an existing issue / problem and seek a solution that will satisfy their needs and take their business forward. The sales role is to understand the specific business issues and then provide a solution that will address their issues in very concrete, tangible ways. Here is where you will need two key things:

A. A complete understanding of the client, their business and their aspirations for the future, together with the blockers that will get in the way and hinder future growth.

B. A thorough and detailed understanding of your product / solution and how to position that product appropriately so it presents a business solution to client growth.

Salespeople also need to remember that not all levels of the product / solution behave the same way in the marketplace, with individual clients as a whole, and /or with individual members of the client buying center.

Each client has their specific view(s) of their business. Listening to how a client views their world and how they prioritize their issues is critically important. The client is providing the roadmap. Sales must follow the client lead.

2. MATCHING AND POSITIONING YOUR PRODUCT AS A CLIENT SOLUTION

After sales has a thorough and tangible understanding of the client and their business issues, only then will sales be able to MATCH and POSITION their product / solution

(cont'd on next page)

appropriately. With that deep understanding of the client, sales can now provide solutions both competitively and with great positive impact. This is the alignment and matching process leading to differentiation.

No two client conversations should sound the same since every client is different. Sales must pick up on those client nuances. The salesperson's aim is to listen, understand and have better client information than your competition. You will then be able to position your product / solution competitively with maximum impact.

3. WHAT DOES THE SKILL OF DIFFERENTIATING SOUND LIKE?

The Sales Matching / Positioning Test

At this stage, you are in position to convert the conversation about your product into how that product / feature will solve and address client needs. As simple as this sounds, this is where both skill and mental agility are absolutely essential. This is often where the sale is either won or lost.

Throughout this process, your focus should be to move the conversation from you and your product to the client and their issues. You must be able to frame your conversation completely into the client's world. It's all about them, not about you.

Here's your test. You need to be able to say something like the following:

Client focus will appear in blue text.
Sales focus will appear in red text.

"Based on what you have just told me, these are the three most important issues you are looking to address in terms of priority:

1. *Issue One*
2. *Issue Two*
3. *Issue Three*

I have a product / service that can address each of those key areas and will allow your organization to take advantage of this competitive gap in the marketplace and allow you to accelerate your growth rate to the 8% you are looking to achieve.

Note that very little of this conversation has to do with you. A majority of the language, in blue, must be about them and their articulated issues.

If you remember that this is all about the client, and that your product / service is simply a solution to their issues, you will have moved into the coveted space called 'advisory selling'.

Differentiation and Product Levels: The Make or Break Sales Skill to Wage the Sales Battle

Multi-dimensional Product Levels: Where the Sales Battle Is Won or Lost!

Your product / solution is not one-dimensional. The complex relationship selling process often makes your product elastic, meaning different things to different people in your client buying center. When you think about your product, think about the multi-dimensional product levels from basic commodity to differentiated product.

1. COMMODITY PRODUCT

This is your product at its most basic level. Without commodity-level product, you can't participate in the competitive marketplace.

Example: You are selling a computer. The computer has very basic software packages included!

Product Level Check List

- Competitors - *Many*
- Price Pressure - *Enormous*
- Ability to Differentiate - *None to very little*
- Ability to Survive - *Vulnerable to the next low-price provider*

2. DIFFERENTIATED PRODUCT

This is where competitive product positioning begins and where the sales battle will be waged and either won or lost!

Example: The computer has advanced software packages with customizable high-level interfaces that are applicable to the client's processes.

To differentiate with high-level impact, here are four key points:

1. Know your client.
2. Know your competition.
3. Determine how to position your product / solution into the client's known and mutually acknowledged value proposition.
4. From the client's value proposition: actively and tangibly pull everything together for the client; position the product; and confirm.

(cont'd on next page)

Differentiation and Product Levels: The Make or Break Sales Skill to Wage the Sales Battle

Product Level Check List

- Number of Competitors - *0 to 5*
- Price Pressure - *Very little (price mitigated by known client value proposition)*
- Ability to Differentiate - *Absolutely*
- Ability to Survive - *Yes, with thinking, listening and problem solving*

Differentiation Risks

- **Competitive Understanding**

  Risk #1 - You assume differentiation without proper knowledge of the competition. You go in with what you consider a differentiated product and the client says, "so does everyone else."

- **Client Understanding**

  Risk #2 - You assume that, because you think the product is differentiated, it is. Remember, the client establishes value. While you may have what you consider a differentiated product, they may not value it. Your product is only purely differentiated until it walks outside your office doors. After that it is subject to the pressures and stresses of the competitive market place. Differentiation has nothing to do with what you think, but how the market and your client evaluates your product.

The Focus of Questions: The Uber Skill Power Tool in the Sales Toolkit

So far we have focused on the marketing mindset required for relationship selling. The marketing landscape you find yourself in will help you identify the tools you need to effectively navigate through this landscape. Both the marketing mindset and the tools / skills are necessary. They represent the holistic WHAT, WHY and HOW of relationship selling and must be mentally integrated to manage the effective and efficient relationship sales process.

QUESTIONS – THE POWER TOOL IN THE SALES TOOLKIT

You can never underestimate the power of the properly used question. When we talk about the relationship sales process, we focus on understanding the client's business, its growth and it's challenges. To understand what that means from the client's perspective, sales must ask questions. Questions are everything – the power tool in your sales toolkit. Questions move the focus to the client. What we know about the client, at the most tangible level, and how we can differentiate and position our product / solution, depends on the information the salesperson discovers. The only way to do that is with the best and most efficient questioning process - the client diagnostic. It is not solely about the question, but the question starts the information process and then keeps that information process going.

Here are the key skills that are required during the questioning process:

- Asking questions
- Listening to the answers
- Engaging in the two-way conversation
- Keeping focused and using mental agility to process all presented information

Caution, This Is Not Easy!

The following information outlines the basic information about the questioning process:

1. Questions show you how to turn an ordinary conversational skill – the art of asking questions – into a formidable business tool.
2. Questions demonstrate not only your intelligence but also the depth of your attention and concern. When you know how to ask the right questions, you can positively move the situation to an optimal outcome.

(cont'd on next page)

The Focus of Questions: The Uber Skill Power Tool in the Sales Toolkit

The Power of Questions

1. ***Questions Require Answers***
2. ***Questions Stimulate Thought and Two-Way Conversation***
3. ***Questions Give Information – from the Client's Perspective***
4. ***Questions Encourage People to Talk***
5. ***People Believe What They Say More Than What You Tell Them***
6. ***The Question Is in Positive Control***
7. ***Questions Show You Care***

The Sales UBER Skill: Asking Great Questions

THE SALES UBER SKILL: ASKING GREAT QUESTIONS

The Essentials

Questions are the most important tool in your sales toolkit. Never underestimate the importance of questions. They help you navigate through conversations and maximize the information gathering opportunity. Asking great questions requires mental preparation, mental agility and precise communication skills. Before you can ask great questions, you need to think of the question's purpose.

- Why are you asking the questions?
- What is the best question to use?
- Exactly what do you want to gain with this question?
- Who are you asking?
- What is their perspective? What are their goals? What are their issues, challenges and / or problems?
- How can you construct and phrase your questions for maximum advantage?

Asking the Question

You have the power to control the kind of information you gather by the kind of questions you ask. Once you have identified your purpose and come up with the most appropriate questions, the next step is to ask the question.

QUESTIONS FALL INTO TWO CATEGORIES: OPEN & CLOSED QUESTIONS

Open Questions

Open questions allow the other person to answer from their perspective. Open questions are other focused and require excellent listening. The result is broad and deep, other-oriented information. Open questions become your tool to make people feel comfortable and establish rapport. They are the basis for relationship building. Questions and their answers allow you to understand people based on their key issues, creating common ground and a needs-based relationship.

(cont'd on next page)

The Sales UBER Skill: Asking Great Questions

Open & Clarifying Questions – The Journalist Questions

How, why, when, where what?

Describe…

Can you elaborate?

Tell me more about?

Closed Questions

Closed questions narrow the universe according to your perspective, not theirs. In addition, closed questions typically also narrow the response. By their nature, closed questions have a limited response universe. They also take more brainpower to create and ask.

Closed Questions

Do you do this?

Are you willing to consider this?

Could you do this or that (multiple closed question)

Delivery

Frame your questions carefully. Be careful not to bury the question in a stream of other words. Don't ask a closed question because it's easy or comfortable for you, but wrong for the kind of information you need. Let the client know you expect an answer. Pause and wait for a response, and let the client know you are interested.

Listening

A question is useless if you don't listen carefully to the response. Great listening requires focused concentration and mental effort. We also fail to listen when we feel an urgency to express ourselves.

Evaluation

As you listen, you need to evaluate the answer. Recognize you may need to ask more questions before you get all the information you need. Use an open, clarifying question to make sure you have the details correct. Ask open questions to get deeper into the heart of the issue or to discover any hidden resistance. Ask questions that delve progressively deeper into the issues.

The Client Business Plan: The Roadmap that Replaces Activity with Smart Activity

"Successful relationship selling is not just a list of activity items. It is a thinking person's occupation, requiring a plan, a process with targets and smart activity, together with integrated skills measured against the only metric that is an indicator of success – The Client Business Plan."

Joanne Flynn, "The Relationship Management Model"©

We have been discussing Sales and Business Development from a holistic perspective. This holistic perspective starts with:

- Competitive Landscape and Marketing Approach
- Product and How to Differentiate with the Highest Impact
- Activity & Sales Tools / Skills to Navigate through Client Conversations

All three concepts must be part of a robust relationship management process that is critical for sales and business development success. Skip any of the three concepts and you will have built flaws into your business development program. All this information is absolutely necessary to develop the key management tools to monitor and measure success. ***It all comes together in The Client Business Plan.***

IS IT ACTIVITY OR IS IT SMART ACTIVITY?

A big misperception regarding sales, business development and client management is that activity is the measure of sales success. Activity is an easy metric and today there are numerous apps that can monitor that activity. However, the only activity metric that is important is smart activity. The only way to determine and assess smart activity is relative to an evaluation context that determines if each activity is the best use of the salesperson's time. Only then can we truly evaluate if an activity is a smart activity. The basis of this evaluation is the Client Business Plan.

ACTIVITY AND THE IMMEDIATE GRATIFICATION SYNDROME

Managing client relationships often has nothing to do with the number of face-to-face calls or sent emails that a salesperson makes in a week. The real question is, relative to a specific client relationship, were the right calls made during that week that will move sales targets forward in a 'process continues'

(cont'd on next page)

The Client Business Plan: The Roadmap that Replaces Activity with Smart Activity

way. It is very easy for salespeople to be seduced by the activity syndrome. We all are. It is very satisfying, immediate gratification– like crossing off the "C" category items on a 'To Do List". But how many times does undifferentiated activity lead nowhere? If we equate activity to time, misplaced activity is a finite time resource that a salesperson:

- Can never get back
- Cannot reallocate to a client for whom that time would have had a meaningful impact

SO WHAT'S THE BIG DEAL? IT'S COMPETITIVE WARFARE OUT THERE! THAT'S THE BIG DEAL!

In a highly competitive marketplace, a salesperson needs to continually evaluate their use of time as a scare resource. The use of time is a controllable factor. All activity is not equal and all clients are not created equal. Salespeople are in different stages with their 'Portfolio of Clients" and must adjust and use their time and scarce resources wisely and appropriately.

Below are three examples of clients in different relationship phases. Each phase requires that the salesperson engage in specific Smart Activities in the context of strategic relationship management and the client business plan.

1. **Build Phase Clients** - For clients in the build phase, you will undoubtedly spend more time than you would like before you see monetary results. It's easy to attempt to quickly move through this cycle. But this phase requires more time and smart activities for success. ***Skip the effort you need to put into a build client and see your efforts languish or plateau before this build client ever becomes revenue generating.***
2. **Maintenance Phase Clients -** These are the revenue generating clients. But don't think they don't require constant effort from you. Your maintenance clients are always being contacted by your competition. Never assume you are safe. There are key maintenance smart activities that must take place to ensure you maintain this revenue-generating client. ***You are now the target for your competition. Their job is to displace you.***
3. **Erosion Phase Clients -** Ignore the smart activities during the maintenance phase and you will surely find yourself in erosion. If you find yourself in erosion, and we all do at one time or another, there will be many key smart activities that must take place to reset the relationship back to the maintenance phase. ***Sometimes erosion is obvious, but other times it is a subtle decline – often easy to miss unless you are measuring results against a client business plan. Ignore erosion at your own risk!***

No one said successful selling and business development was easy!

The Ultimate Sales Growth Accelerator: REALLY Understanding the Total Client Buying Center (TCBC)

Breathe Life into Your Client Business Plans
Take Your Sales Targets to the Next Level

Client Business Plans are one of the most critical sales business tools. A big problem with these plans is they often neglect to identify the most important information about the client – ***the qualitative data!!*** What does this mean?

THE TOTAL CLIENT BUYING CENTER (TCBC)

I've seen countless business plans that identify the names of people within the client buying center. But, remember, a name is only a name without an operating context associated with the name. I will often hear salespeople say, "I have the company organization chart." So what! A name on an organization chart is often meaningless. It is simply a 'what' data point. There is so much more to this name that a great salesperson must know to truly understand the buying landscape:

- Who is in the TCBC?
- How does that TCBC operate?
- What role does each person play in the TCBC?
- With whom do people within the TCBC interact?
- What are those relationships?
- Are they formal, hierarchical lines of authority and responsibility?
- Are they informal, matrix lines of power and influence?
- What impact do these people have on the ultimate buying decision?
- How long will the decision-making process take?
- What are other existing supplier relationships with each person in the TCBC?

For each name in your business plan, you must have detailed operating context information. *Only then does that name mean something important and relevant.*

CHALLENGE: CONVERT THE CLIENT ORGANIZATION CHART INTO THE CLIENT 'ORGANIGRAM'©

What is an 'organigram'? It is the realignment of the formal organization chart to depict the way an organization really works informally. It goes beyond people's organizational roles to understanding the way people operate in those roles and, therefore, how the organization really works. The 'organigram'© reflects:

- Who are the decision makers?
- Who are the influencers?
- Who are the gatekeepers?
- Who are the bottlenecks?

(cont'd on next page)

The Ultimate Sales Growth Accelerator: REALLY Understanding the Total Client Buying Center (TCBC)

WHY DO SALESPEOPLE TEND TO AVOID ASKING ABOUT TCBC INFORMATION?

To ask for information about the TCBC means the salesperson must ask what feels like very personal questions. And, if those questions are improperly asked, that's exactly how those questions come across, as too personal and impertinent. When these questions are improperly asked, they can disrupt the critical relationship-building process. So, more often than not, salespeople will avoid asking those questions and assume critical TCBC information. *Here's how TCBC assumptions can kill your sales efforts, create invalid operating contexts, waste your time (your scarce resource that salespeople must manage) and introduce significant flaws into your Client Business Plan.* Some results include, but are not limited to:

- **No business** because salespeople are talking to the wrong person who may not be a key player in the decision-making process.
- **Delayed business results and missed sales targets** due to a lack of understanding regarding the time to make decisions by the key people in the TCBC.
- **Delayed or no business** because the salesperson did not develop business relationships with all the important people in the TCBC.

TCBC INFORMATION - THE MOST CRITICAL AND DIFFICULT QUESTIONS TO ASK

There is indeed a mindset and process that exceptional salespeople must both understand and have the ability to implement / execute. The TCBC questions do have a structure, sequence and skill set that must be followed. Any gaps in both knowledge and skills in this area will create flawed Client Business Plans leading to inaccurate sales projections and missed strategic initiatives. Both knowledge and skills, at this stage, must be consciously and methodically applied.

Remember, there is nothing casual or haphazard about building data about the TCBC.

Sales & the DiSC Profile®: Align Salespeople & Clients

Maximize your Understanding of the Total Client Buying Center (TCBC) & Develop Serious Client Business Plans

The DiSC® Profile is a very powerful tool used in organizations globally. The DiSC® Profile assesses people for their underlying personality styles. The model presents a methodology for understanding the feedback from the DiSC® Profile. The key elements that make up personality and motivators can be used to manage effective interpersonal relationships, manage the sales process at a very personal level, and understand how to create highly effective client business plans. This information breathes life into and gives dimension to effective client business plans.

3 WAYS TO INCORPORATE DISC® INTO YOUR CLIENT BUSINESS PLANNING PROCESS TO INCREASE SALES

1. **The DiSC® Profile, Salespeople, and Understanding Ourselves and Our Clients**

What is the DiSC® Profile, and regarding sales, what do the results tell us?

The DiSC® Profile helps us understand personality styles, our own and others. Managing client relationships is all about having a deep understanding of ourselves and how we, in sales, need to adjust our style and approach to effectively work with our clients. We sell into the total client buying center (TCBC). Therefore, salespeople need to understand the TCBC and the associated client buying patterns. Every client has its own organizational structure, both formal and informal. It is made up of people and each person in the TCBC brings their own unique personality style to the TCBC. So salespeople must deeply understand each person individually and then the dynamics of the TCBC, in total, in order to effectively understand:

- The kind of information the client needs and the way they need / want it.
- How the client organization operates and how people interact so you can proactively connect with the appropriate parts of the buying center.

(cont'd on next page)

Sales & the DiSC Profile®: Align Salespeople & Clients

- The how, why and when behind the client decision-making process. How different personality styles within the TCBC can have an impact on both the decision-making process and the time to make decisions.

2. **Observe and Identify Client Behaviors to Effectively Manage Client Relationships and the TCBC?**

The DiSC® Profile provides a key to understanding the all-important motivators underlying each personality style. This helps us understand people on a much more profound and complex level. Using the DiSC® Profile can be a very powerful tool to carefully assess people on a very individual and personal level. The four major DiSC® categories are:

- D – Dominant
- I – Influencer
- S – Steadiness
- C – Conscientious

Each of the above categories / styles will react differently to both normal and stress situations. Salespeople must train themselves to observe these client reactions and behaviors. They are indicators that will provide highly relevant and applicable client data that leads to an understanding of their buying patterns:

- How do they respond to open questions?
- What is the quality and quantity of information the client gives?
- How well do they listen to you?
- What is their span of attention?
- What timeframe do they operate in and refer to?
- Are they conceptual and visionary, or fact based and data driven?

3. **Developing and Managing the Client Business Plan**

Effective salespeople manage more than the quantitative sales process that measures activity in the number of calls and visits made. While that information is important activity data, it is the quality of that activity that is most important. The quality of effective relationship selling is all about providing valuable activity to the right people at the right time, the way they value that activity and ultimately act upon it. This is the qualitative information that an understanding of the DiSC® Profile can provide. This information creates an understanding of the TCBC and the additional complex dimensionality that makes a Client Business Plan a robust and organic business tool.

Selling and the DiSC® Profile – The Easy Observables

It's All About the Information!

The question is often asked, "So how can I determine my client's DiSC® profile? Wouldn't it be nice and easy to have clients fill out the profile? But since that's often not going to happen, here are some things to consider. The behaviors are right in front of you.

In sales, it is the salesperson's job to be observant and process every single clue the client gives. If you can master the most obvious and easily observed behaviors, it doesn't matter if you are selling face-to-face or over the phone. It's all about the information.

So what happens when you are in a face-to-face client meeting or having a telephone conversation? One thing is for sure – there will be an exchange of information. The way information is both delivered and processed by individuals is unique to them. Each one of us has information patterns. Observing and understanding the information patterns will help you to better understand the client and ultimately their buying patterns and signals. With this information, you can begin to understand the client's individual DiSC® profile.

We have broken these signals and buying patterns into the following segments:

- **D – Dominant**
- **I – Influencer**
- **S – Steadiness**
- **C – Conscientious**

Within each of these categories, look at the following:

- **Type of Questions to Use**
- **Listening Levels to Observe**
- **Quality of Information Given**
- **Quantity of Information Given**

D - DOMINANT

- **Type of Questions to Use -** Use focused open questions.
- **Listening Levels -** Because of their short span of attention, their listening is inconsistent, based on what's important to them.
- **Quality of Information Given -** Average but short and often not fully defined.
- **Quantity of Information Given -** Little quantity. Ask questions. Don't assume.

I – INFLUENCER

- **Type of Questions to Use -** Use many open questions to drill down to tangible information.
- **Listening Levels -** Influencers are generally less precise listeners, unless they focus and then their listening can be very sharp.
- **Quality of Information Given -** Low quality, but it sounds really good.

(cont'd on next page)

Selling and the DiSC® Profile – The Easy Observables

- **Quantity of Information Given -** You will get a lot of information, but always listen for substance and tangibility.

S – STEADINESS

- **Type of Questions to Use -** Be prepared to use many layers of open questions.
- **Listening Levels -** They are excellent non-judgmental listeners.
- **Quality of Information Given -** The quality may be low because it is typically coded.
- **Quantity of Information Given -** You will generally be given a lot of information.

C – CONSCIENTIOUS

- **Type of questions to Use -** Use open questions.
- **Listening Levels -** Conscientious are among the best critical listeners.
- **Quality of Information Given -** The quality of information given will be very good.
- **Quantity of Information Given -** Don't expect a tidal wave of information. You will need to work for it.

Add this tool to your sales tool kit!
See the impact to your sales effectiveness!

Sales Upskilling as a Growth Accelerator

3 Competency Considerations - When Learning & Development Can Help Accelerate Strategic Growth Goals

Review of your sales force competencies must be a continual process. For many organizations, the sales function is the front line into the marketplace. Keeping the sales function aligned with strategic goals will have a significant impact on growth. So how do you ensure your current sales function is robust, ready and upskilled to accomplish the task? ***When is it appropriate to determine if it is time for learning & development to play a part in accelerating strategic growth goals?***

1. GOING BEYOND THE NUMBERS

Sales numbers can only give one part of the total sales story. Dig deeper behind those numbers to determine what they really mean.

Evaluate each salesperson relative to the potential wallet value of the territory or designated client base.

Sales numbers are not created equal. Often, we only evaluate the numbers, for example, salesperson increased their numbers by 10%. On the surface, that may look good, but the bigger question is, "10% relative to what"? If the wallet value of a client base or territory is valued at a 30% increase, then the results are really lower than expected. That missing 20% gap has just welcomed your competition into your client base. If the competition is good and you are outcompeted, your 10% increase this year could drop to 5% next year. ***Every missed opportunity on the sales side gives your competition an advantage at your expense, and introduces unintended risk into your client plan and ultimately strategic results.***

Evaluate each salesperson relative to the quality of both the client base and the business they are doing.

All business is not created equal. Is the salesperson servicing the same clients without prospecting and bringing in new business? Is the business being done with too few clients introducing vulnerability and the risk of erosion? Is there an over reliance on 'client relationships' to carry the sale? Has complacency set in? Is the salesperson self-selecting the clients they want to work with and ignoring those that are more difficult? Has the knowledge and / or skill base required to do this part of the job eroded over time from lack of use?

(cont'd on next page)

Sales Upskilling as a Growth Accelerator

Evaluate each salesperson relative to their market / competitive savvy.

For the most part, the days of simple sales are gone. There is often overcapacity in the marketplace resulting in product commoditization, giving clients real, alternative choices. Today, salespeople, to stay current with and relevant to their clients, must have a sophisticated marketing and sales understanding:

- Do salespeople understand the pressures overcapacity can have on the product?
- Do salespeople understand how to highly differentiate the product so it solves the problems for different members in the buying center?
- Is the salesperson optimizing every client interaction with the absolute, correct sales behaviors and actions all the time?
- Is every action moving the client process forward?

If the sales process is not moving forward, then is it either static or moving backward? Today, there is no steady state.

2. LEARNING & DEVELOPMENT ACTIONS

If there are negative responses to any of these questions, there is a high probability that strategic targets will not be met. The three considerations listed below highlight real consequential, strategic deficits that can cause serious organizational results. At the end of the year, it is not a responsible management question to ask, “How did that happen?” It happens because these operating deficits have been ignored or denied. Senior leadership and sales management must ask the following questions:

A. Is there a knowledge deficit?

The market is constantly changing. What was relevant a year ago or 3 years ago is often no longer relevant. Therefore, the knowledge base of salespeople must be continually upgraded. Being stale in a robust market builds erosion into your business model. ***This deficit requires learning & development as a strategic imperative.***

B. Is there a skills deficit?

As any athlete knows, continual practice keeps skills at their highest level. The analogy directly applies to sales. When simple and complex sales skills are not continually reevaluated, or are taken for granted or assumed, a strategic skills deficit builds erosion in your business model. A high-performing salesperson must have high-performing skills. ***Any skills deficit requires learning & development as a strategic imperative. This skill deficit will not get better by itself.***

3. OBSERVATION

Even a perceived business as usual (BAU) sales operation, in a changing environment, must be continually evaluated. Deal with knowledge and skills deficits as soon as they appear or you will certainly deal with them later, when the deficit gap may have become an insurmountable abyss.

6-Step Checklist to Accelerate Your Sales Growth

Increase Success with a Multifunctional, Disciplined Sales Methodology

Phoenix Strategic Performance (PSP) has developed an approach and business development / sales methodology to provide the WHAT, WHY and HOW information necessary to drive complex sales and accelerate growth. We have a Strategic Business Development Learning Process coupled with our proprietary PSP Assessment and Platform that makes managing the sales process and sales results sustainable, 'forecastable' and strategically aligned.

STEP 1. 'TANGIBILIZING'© AMBIGUITY

If you can't define it – you haven't 'tangibilized' it.

'Tangibilizing'© is the process of taking ambiguous language and, through the questioning process, precisely defining the terms to describe the client situation in concrete terms.

STEP 2. DIFFERENTIATION: THE MAKE OR BREAK SALES SKILL

Multi-dimensional Product Levels: Where the sales battle is won or lost!

Your product / solution is not one-dimensional, but elastic, meaning different things to different people in your client-buying center. Think about the multi-dimensional product levels from commodity to differentiated product.

It's All About the Client

1. Have a complete understanding of the client at every level and layer of the organization.
2. Have a thorough understanding of your product / solution and how to position it.

STEP 3. THE FOCUS OF QUESTIONS: POWER TOOL IN THE SALES TOOLKIT

The What and the How?

The marketing landscape will help identify the tools needed to effectively navigate through this landscape. Both marketing knowledge and mindset, and the tools / skills are necessary. They represent the holistic WHAT, WHY and HOW of relationship selling and must be integrated to manage the effective and efficient relationship sales process.

The Question Essentials

Never underestimate the importance of questions in the sales tool kit. Questions help navigate through conversations and maximize the information gathering opportunity. Asking great questions requires mental preparation, mental agility and precise communication skills. Great questions have a purpose.

(cont'd on next page)

6-Step Checklist to Accelerate Your Sales Growth

STEP 4. THE CLIENT PLAN & THE TOTAL CLIENT BUYING CENTER (TCBC)

Often business plans merely identify the names of people within the buying center. But, a name is only a name without an associated operating context. It is simply a 'what' data point. There is so much more to this name that a great salesperson must know to truly understand the buying landscape. The holistic perspective starts with understanding the:

- *Total Buying Client Center (TCBC)*
- *Competitive Landscape and Marketing Approach*
- *Product and How to Differentiate with the Highest Impact*
- *Activity & Sales Tools / Skills to Navigate through Client Conversations*

STEP 5. SALES & THE DISC PROFILE®: ALIGN SALESPEOPLE & CLIENTS

Use the DiSC Profile to understand effective interpersonal relationships, manage the sales process at a very personal level and understand how to create highly effective client business plans. That information breathes life into and gives dimension to effective client business plans.

STEP 6. SALES UPSKILLING AS A GROWTH ACCELERATOR

After considering #1-5, review your current sales force competencies. Ensure your current sales function is robust, ready and 'upskilled' to accomplish the task. Determine when it is time for learning & development to play a part in accelerating strategic growth goals to ensure sustainable growth, acceleration and value creation.

JOANNE FLYNN

In 2014, Joanne Flynn founded Phoenix Strategic Performance, a strategic human capital advisory consulting firm. Prior to this, since 1989, Joanne led the consulting practice of Phoenix Group International, an executive recruiting and human resource consulting firm, where her area of expertise was the global Financial Services industry. Joanne is now taking best practices from the human capital intensive financial services industry and adapting those best practices to startup and growth businesses. She is a thought leader in the areas of strategic organizational alignment, organizational agility, human capital gap analysis, leadership challenges for the new workplace and transformation leadership.

Previously, from 1980 – 1989, Joanne was Vice President of Global Learning & Development for Goldman Sachs, Inc. At Goldman Sachs, Joanne implemented programs to improve the organizational effectiveness of business units, most notably investment banking, equities, fixed income and operations.

From an independent vantage point, Joanne worked with organizations as they faced global growth and competitive challenges. She worked with her clients to be both externally focused and internally responsive. With her unique background, she aligns competitive business development efforts with related internal organizational leadership challenges. With the benefit of her career-long focus, Joanne contributes the unique insight of aligning strategy to internal organizational structure and process. She focuses on human capital relative to strategic initiatives, accelerated business growth, value creation and business development.

Joanne is experienced in all aspects of organizational development and training on a global level. Her consulting engagements have included the design and delivery of learning and development programs on the topics of strategic leadership, business development, client account management, strategic selling, management development, and executive coaching. Her consulting clients range from global investment banks to small private equity / venture capital firms and in people intensive industries.

Joanne holds a Master of Arts degree in Business Management from the University of Oklahoma. In addition, she holds a double degree major in History and German from the College of St. Elizabeth, as well as certificates from a variety of leading universities and professional training and development organizations.

Joanne T. Flynn
Phoenix Strategic Performance

(480) 242-5522
jflynn@phoenixstrategicperformance.com
www.phoenixstrategicperformance.com

To schedule your complimentary human capital assessment, please visit:
http://www.phoenixstrategicperformance.com/schedule-assessment