



## Customer Centric Selling

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**Authors' Bio:** Michael Bosworth and John Holland are cofounders of CustomerCentricSystems, LLC. **Bosworth**, author of the influential book *Solution Selling*, has helped tens of thousands of salespeople and executives define, automate, and implement the organizational sales process. He has been a featured lecturer at the Stanford School of Business and the Stanford program on Market Strategy for Technology-Based Companies. **Holland** has achieved extraordinary success as a sales executive with IBM's General Systems Division, district manager with Storage Technology Corporation, and regional business unit manager of Sand Technology. He has worked with and trained hundreds of sales organizations globally.

**Authors' big thought:** The most difficult task in selling - and the number one key to success - is to get inside the head of your buyer. *CustomerCentric Selling* presents a dynamic process for first understanding and shaping your buyers' concerns, then helping those same buyers visualize your offering to achieve goals, solve problems, or satisfy needs.

### Chapter Notes:

#### **Chapter 1: What is Customer-Centric Selling?**

Customer-centric behavior has seven basic tenets. Imagine a spectrum of selling behavior ranging from traditional on one end to customer-centric on the other, and locate yourself on that spectrum. Are you where you want to be or if not, what needs to change?

### 1. *Having Situational Conversations versus Making presentations*

- In order to be effective, a salesperson must be able to relate his or her offering to the buyer in a way that will allow the buyer to visualize using it to achieve a goal, solve a problem, or satisfy a need. This in turn requires a conversation.
- Customer-centric Selling has been designed to help you engage in relevant, situation-specific conversations with decision makers, without having to depend on canned slide presentations.

### 2. *Asking Relevant Questions versus Offering Opinions*

- Traditional sales people tend to offer their opinions to their buyers, while customer-centric sales people tend to ask relevant questions.
- Most sellers come to a vision of a solution to their buyer's problem before their prospective buyer does. When a traditional seller sees the solution, he or she tends to project that vision onto the buyer.
- Most people don't even like their loved ones telling them what they need, much less a salesperson. People love to buy, but hate feeling sold.
- Top-performing salespeople use their expertise to frame interesting and helpful questions, rather than to deliver opinions. Asking questions shows respect for the buyer. When buyers come to grips with a series of intelligent questions - ones that can be answered, and the answers to which build toward a useful solution - they do not feel that they are being sold.

### 3. *Solution-Focused versus Relationship-Focused*

- Traditional sellers are relationship-focused, and customer-centric sellers are solution-focused.
- In situations where a buyer is attempting to achieve a goal, solve a problem, or satisfy a need, the successful seller has to do far more than simply cultivate relationships. Having a buyer like you or respect you are not mutually exclusive - after you earn a buyer's respect, there is a high probability that a strong relationship can be established.

### 4. *Targeting Business People versus Gravitating Toward Users*

- Traditional salespeople gravitate toward the users of their products, while customer-centric salespeople target business decision makers.
- A business conversation should be usage and results oriented rather than feature oriented. It focuses on why a product is needed; how it can be used to achieve a goal, solve a problem or satisfy a need; and how much it costs to use versus the benefits it presents.

#### 5. *Relating Product Usage versus Relying on Product*

- Customer-centric conversations take place when sellers are able to relate conversationally with their buyers about product usage.
- Traditional sales people have no choice but to rely on their product to create interest.

#### 6. *Managing Their Managers versus Needing to Be Managed*

- Traditional sales managers monitor activity rather than progress. This is because most sales managers are promoted to that position not because of their superior management ability or potential, but because they have sold the most.
- Chances are very good that they have sold the most because they are intuitive, naturally talented salespeople.
- When they find themselves in their new management position, they attempt to manage the only things they believe they can control. They manage activity.
- Customer-centric salespeople are able to converse situationally and ask relevant questions to empower business decision makers to understand how they can achieve their goals, solve their problems, and satisfy their needs. Their managers simply need to monitor their progress and help them succeed.
- Customer-centric salespeople get the support they need when they need it, because they are able to demonstrate to their managers that they have earned the right to command finite company resources. Before they ask for resources, they can document a decision maker's goal, current situation, and vision of using their offering to achieve a goal, solve a problem, or satisfy a need.

#### 7. *Empowering Buyers versus Attempting to Sell them*

- When buyers deal with sellers, they feel pushed, manipulated, pressured into doing things that they end up wishing they hadn't done.
  - The authors believe a seller's objective, going into a new relationship with a buyer, should be to help the buyer achieve a goal, solve a problem, or satisfy a need - and then be prepared to leave if the seller doesn't believe the prospect can be empowered to accomplish one of those goals. This may sound like only a small shift away from a traditional sales approach, but in fact, it's fundamentally different.
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- Even the most gifted sellers can become more customer-centric. The key to a natural salesperson succeeding as a sales manager is to first become consciously customer centric.

- CustomerCentric selling, as explained in this book, is designed to help all sellers assess where they are, and give them a specific methodology to help them become more successful.

## Chapter 2: Opinions - the Fuel That Drives Corporations

- This is a chapter about opinions: how they are shaped, and how they should be shaped.
- Opinions play an all-important role in our professional and personal lives. Not everyone's opinion is valued equally. Most organizations have structures in place to ensure that decisions will be made based *only* on opinions that have been arrived at (or at least blessed) by higher -level people.
- The major exception to this rule is the sales function. While salespeople may be given very specific targets to achieve, they are also given enormous latitude in arriving at opinions, and making decisions, that not only affect the organization's performance, but also ultimately shape the customer's experience. In how many organizations are sales people given the latitude to decide
  - How to position their offerings to buyers?
  - Which accounts and titles to call on?
  - Which accounts to include in their pipelines?
  - Which accounts to close and when?
  - How to interpret lost opportunities?
  - Which changes in offerings are needed to improve competitive positioning?
- Companies rely on the opinions of traditional sales people to build a pipeline, create a forecast, and deliver top-line revenue.
- The most common reason that new companies fail is that Sales does not deliver according to plan.
- How the product is described to potential buyers is the position in the market. Positioning is all-important in the sales process.
- For companies with multiple offerings selling into multiple vertical industries, the challenge of positioning offerings becomes formidable, even for the most talented and experienced salespeople. For traditional salespeople, talking about their offerings represents their comfort zone, partly because it was what their company trained them to do. It allows them to feel like experts, and to control the meeting.
- The irony is that leading with features - operating in the comfort zone - can also cause a salesperson to lose control.
- Once a specific offering is mentioned, many buyers ask a very logical question: "How much does it cost?" But this is often too early in the conversation to discuss pricing, because no goals, problems, potential usage, or value have been established in the buyer's mind.
- Price is a qualifier and it should be shared with buyers relatively early in the sales cycle. But until the buyer begins to understand the potential usefulness of the

product, his or her reaction is very likely to be "Hey, this seems expensive." And once that conclusion is drawn, the seller faces an uphill battle to gain mind share.

- New hires understand that their honeymoon period is likely to last about 60 days, after which their pipelines must grow. Opinions come into play as the salesperson decides what approach to employ: go for quantity of buyers or quality of buyers? (Traditional salespeople think quantity; customer-centric salespeople think quality.) Even if they try to focus on what they feel are qualified opportunities, their judgment may be clouded, and their opinions shaped, by the pressure to show activity.
- Within a few more months, they will be required to provide their opinion as to which opportunities in the forecast will close, why they will close and when. But in many cases, the weakest link in the chain is a salesperson's opinion of what constitutes a qualified opportunity.
- After a salesperson has competed for months and then lost, the buyer tends to let him or her down easily. One of the easiest ways out is to blame price or product, and most traditional salespeople are happy to take these reasons back to their managers.
- As you may have surmised, opinions permeate most sales organizations. Their importance is magnified when people are asked to predict the future. This barbaric ritual is euphemistically referred to as *forecasting*.
- Salespeople quickly learn that monthly review meetings with their managers go much better when they have lots of accounts listed in their pipelines. Because there is no standard way to position offerings, it is up to each salesperson to list the accounts he or she feels are viable.
- Sales managers are required to give their opinions of their salespeople's opinions. The job of the sales manager is a very difficult one, and most are subjected to a great deal of pressure to deliver revenue objectives.
- The barbaric ritual continues all the way up the chain - from district, to region, to the vice president of Sales.
- CFOs have learned from experience not to take revenue projections from Sales at face value. They make an adjustment and tell the CEO what the results for the quarter will be, so that he or she can set earnings expectations for analysts and investors.
- In reality, monthly forecasts tend to be most useful as potential wake-up calls, alerting salespeople that their pipelines are thin and warning them that they've got to ramp up their business-development activities.
- One of the most difficult aspects of forecasting is projecting when opportunities will close. Too often close dates have nothing to do with the buyer's agenda, but correspond to seller's agendas. Under the best of circumstances. Closing before buyers are ready requires significant discounting. In the worst case, pressuring

buyers prematurely can cause the seller's organization to either lose the sale or compromise pricing.

- The concept of "best practices" has been associated with virtually all aspects of business. Sales has been, and remains, the most notable exception. The authors believe that this view can be changed, but only after companies provide direction to all their salespeople about how to use offerings to achieve a goal, solve a problem, or satisfy a need. Unless and until this happens, companies will continue to be dependent on the opinions of their salespeople in the following areas:
  - How their accounts are positioned to buyers
  - What accounts and titles to call on once given a territory
  - What accounts should be included in their pipelines
  - What accounts will close, and why, and when
  - What the reasons are for losses
  - What enhancements to offerings are necessary to improve win rates
- Reports are only as good as the quality of the input that goes into them. The input to these systems consists largely of salespersons' opinions of the outcomes of sales calls they have made. When you add in the fact that product positioning is left up to individual salespeople, and that they often are under enormous pressure to justify their positions, you can see how problems get built into the systems.

### **Chapter 3: Success Without Sales- Ready Messaging**

- A smaller number (about 10%) of salespeople use a customer-centric approach intuitively. There are certain market conditions that make success without Sales-Ready messaging possible.
- Early market buyers excel in determining applications for technologies that can give them a return on their investment in those technologies. They do what the authors contend traditional salespeople don't do. They focus on issues rather than features. Early -market buyers have defined and will continue to define start-up organizations' niches.
- The authors' experience suggests that early-market visionaries control (or can get access to) adequate funds. As a result, most early purchases are made impulsively, without extensive debate. Gut instincts play a much larger role than formal cost-benefit analyses.
- Early market buyers are willing to endure the inconveniences and disruptions that almost always come along with first-generation customers. Early- market buyers often participate in identifying problem areas, and in making suggestions about possible improvements.

- Assuming you want early market buyers the best approach is to try to get exposure for new offerings by creating a buzz and then waiting for the early market buyers to find you. Early market buyers buy - they don't need to be sold.
  - Early market buyers are often found at small to midsize companies (or divisions of large companies) that have minimal red tape and aren't burdened by the need to get a consensus to make a somewhat adventurous buying decision.
  - When integrating a new offering, early-market buyers generally have the expertise to integrate the new technology into their current environment.
  - Mainstream-market buyers don't want the latest technology. Their comfort zone lies in the middle of the pack- following, not leading. They want to know that the offering is proven, that there is a track record, about what business results have been achieved and the ROI. Prior to making decisions, main-stream buyers need to make comparisons.
  - Prior to signing, mainstream- market buyers may want a cost-benefit analysis of a potentially risky expenditure. And finally they often require references and reassurances that the early market buyer doesn't ask for.
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- While early-market buyers can serve as a start-up's lifeblood for the first several months, longer term revenue objectives cannot be realized within this segment, which makes up only a small percentage of the overall market.
  - After the initial missionary effort, the months that follow can be heady ones as sales come more easily and momentum is established. The company is now approaching the chasm between the early and mainstream markets. To get across this chasm, the company needs to be sure that at least two fundamentals are in place: (1) the new offering has been proven functional and reliable, and (2) there have been quantifiable results. With these two criteria met, and with a sales force that is up to the new challenge, the company is ready to attempt to penetrate the mainstream market, which usually represents something like 80% of the market potential.
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- In many cases a good percentage of the initial salespeople hired were initially customer-centric. As revenues grow and some of these top performers accept promotions into sales management, a shift begins to take place within the organization. The sales talent that the company was able to initially attract and hire begins a downward spiral.
  - Newly promoted managers, that is, those who were responsible for early sales results, now are responsible for hiring new salespeople. In many case, this is a task for which they are ill-prepared and temperamentally unsuited.
  - So many salespeople wing it because in most cases, there is no clearly defined structure within which salespeople can operate. Expectations (beyond achieving quota) are vague; a definition of a standard sales process is almost nonexistent.

- The underlying reason most traditional salespeople wing it is that their sponsoring organizations haven't codified the selling process. The positioning of offerings is abdicated to salespeople, even though it never appears (and doesn't belong) in their job descriptions.
- Some salespeople are exceptionally talented, in the sense of being naturally customer-centric. They make up about 10% of the sales population. These are gifted, intuitive salespeople, with the remarkable ability to transform (mostly irrelevant) sales training into a coherent message - one that is tailored to the title and function of the person they are calling on.
- To reiterate: calls made by customer-centric salespeople are conversational. These people relate to buyers, establishing their credibility by asking intelligent questions. Rather than leading with offerings, customer centric people ask questions. They seek to understand a buyer's needs so that they can focus on the parts of their offerings that provide a fit. By so doing, they are preparing buyers to want what they are going to offer, later in the conversation.
- Naturally customer-centric sellers are the only salespeople who are capable of doing an adequate job of positioning offerings without Sales-Ready messaging. They rarely waste time on unqualified opportunities.
- Customer-centric sales people need minimum coaching. After completing new-hire training, they find the best product and support people, and pick their brains to understand what this offering allows the buyer to do. Customer-centric sellers make their first sale quickly and most make their numbers the first year. In subsequent years, they almost always exceed whatever quota they are assigned.
- Customer-centric salespeople are patient; traditional sellers are not. Once a buyer shares a goal or reveals an organizational problem, traditional salespeople launch into a "here's what you need" product pitch. Customer centric sellers ask buyers why they are having trouble accomplishing the stated goal. They dig into the barriers that are standing in their way of a solution. By doing so, they can home in on the capabilities of their offering that may actually help the buyer.
- Two percent of selling solutions consist of customer-centric sellers calling on early-market buyers. This situation yields the highest ratio of success. 18% of selling solutions consist of traditional sellers calling on early-market buyers. The vendor still has a high probability of a sale.
- In 8% of selling solutions, customer-centric sellers are calling on mainstream buyers. This is the best use of a customer-centric seller's talents. The mainstream buyers need help in understanding what the offering will enable them to do, and how they will benefit as a result. The customer-centric seller has the ability and patience to navigate through the buying cycle and maximize the chances of getting the business.

- The most disturbing fact is that 72% of the time, salespeople who are selling risk (that is, focusing on technology and features) are calling on people (mainstream buyers) who are highly risk-averse.
- By empowering traditional salespeople to have conversations about usage with Key Players, marketing can accelerate acceptance and market share at higher margins.
- In summary, there are circumstances in which new offerings can enjoy success even without Sales-ready messaging being made available to their sales organization. As markets and sales organizations mature, however, penetration of the mainstream market almost always proves to be more challenging. To sustain success, companies have to realize how different mainstream-market buyers really are, and act on that insight.
- Mainstream-market buyers don't buy; they need help in understanding how an offering can enable them to achieve a goal, solve a problem, or satisfy a need. So, companies can maximize their chances of prospering if they enable their growing number of salespeople to have conversations with buyers in a way that positions offerings more consistently, leveraging best practices.

#### **Chapter 4: Core Concepts of Customer-centric Selling**

- CustomerCentric Selling empowers sellers to execute Sales-Ready messaging to help their buyers visualize using their offerings to achieve a goal, solve a problem, or satisfy a need.
- People who enjoy helping their customers use their offering to achieve goals and solve problems make excellent sales people.
- If the experienced salesperson believes that selling means persuading, convincing, closing, and so on, then he or she is very likely to create more of the bad experiences that buyers disdain - this time in your company's name. If the existing employee likes to help people, has the confidence to approach strangers, and knows how to use the product offering, then the authors recommend teaching that person to sell.
- Reframing the concept of selling will cause the sales call, and the entire relationship, to be far more productive and rewarding for all parties.

What follows are thirteen core concepts that collectively begin to reframe the concept of selling.

##### *1. You get delegated to the people you sound like*

Most senior executives will allocate about 30 minutes to a sales call with a salesperson who has proved competent enough to get an appointment with them. But few executive calls last a full 30 minutes. If the seller begins expounding on technology, features, platforms, and so on, senior executives are quick to delegate them to the people in their organization who *care* about those items. In many cases it would have been better not to have called on the executive at all. Your company's position may have been

compromised in the eyes of the buyer. Access to decision makers is a high risk, high-reward proposition.

*2. Take the time to diagnose before you offer a prescription*

Develop the diagnostic questions about the buyer's current situation and the potential usage of the offering to help the buyer achieve a goal, solve a problem, or satisfy a need. Most human beings do not appreciate unsolicited advice. If the potential buyer is being asked intelligent questions that he or she is capable of answering, the advice that emerges from that process is, in a very real sense, solicited advice. The buyer has participated in, and partly directed, the conversation that developed both the diagnosis and the prescription.

*3. People buy from people who are sincere and competent, and who empower them*

The buyer must own achievement of the goal. If your buyer concludes that you first understand the current situation, goals, or problems, then, and only then, you have earned yourself the opportunity to help your buyer understand how he or she can achieve the goal, or solve the problem, with the specific capabilities of your offering.

*4. Don't give without getting*

The seller should strive to create a reciprocal relationship - a quid pro quo. If quid pro quo becomes a habit early in the relationship, sellers can become more effective negotiators and deliver more profitable business. Once salespeople understand quid pro quo, they keep on thinking and acting that way.

*5. You can't sell to someone who can't buy*

Many salespeople end up in the free education business. Ideally, your prospect is both the user of your product or service and the head of a department that already has the money budgeted.

*6. Bad news early is always good news*

This core concept is for salespeople who have long sales cycles. In many cases the buyer knows from the start which vendor they want to buy from, but they still had to get others to quote to demonstrate to senior management that they did sufficient due diligence. If you are not the predetermined vendor, bad news early is good news. It is important to be realistic about your chances of success. A salesperson has to qualify opportunities, which in many cases means disqualifying opportunities

*7. No goal means no prospect*

When meeting buyers for the first time, the salesperson's primary focus should be to build rapport and trust. Without rapport and trust, it is unlikely that buyers will share their goals and virtually certain that they will not admit their problems to a salesperson. An opportunity should go from inactive to active when the buyer shares a

goal. Sometimes the solution lies in focusing on goals, rather than problems as it is far easier for salespeople to get a buyer to share a goal than a problem. Once a buyer shares a goal, the seller has an opportunity to use the solution development process to ask a series of questions to understand the current situation. The buyer can then be empowered with usage scenarios that will help the buyer understand how he or she can achieve the goal by use of the seller's offering. Without a goal, there can be no solution development and therefore no prospect.

*8. People are best convinced by reasons they themselves discover*

The process of asking questions helps buyers discover their own reasons that prevent them from achieving a specific business result. Expert buyers are able to convince themselves that they should buy something, because they figure out on their own how to use the proposed offering. But most buyers *aren't* experts, and therefore need help buying. By using a process that allows the buyer to feel that he or she is in control. By helping rather than pressuring, and by using content that is aimed at the buyer's specific situation, sellers can shape their customer's experiences. They can lead the buyer to discover the solution, and therefore own it.

*9. When selling, your expertise can become your enemy*

When experienced salespeople see a solution to the buyer's need, they get enthusiastic and impatient, and start projecting their solution onto the buyer. This is a paradox. Your clients want expert salespeople. At the same time, if your salesperson is tempted to use his or her expertise as a club on the buyer, a lack of expertise can make for a better sales call. Without expertise, your seller's only course of action is to ask questions.

*10. The only person who can call it a solution is the buyer*

The authors believe that a salesperson can't and shouldn't define a solution. Only the buyer can call something a solution. When the buyer - using the right process and content - leads the buyer to conclude that he or she needs the specific capabilities the seller has posed, only then do we have a solution. Because the buyer said so.

*11. Make yourself equal, then make yourself different - or you'll just be different*

When salespeople are in competitive situations, they frequently fall into a trap that is unintentionally set by their buyer. The buyer may ask how your product is different from the one they like best. This happens before trust has been established, before goals have been articulated, before diagnosis has occurred, and before the buyer has become convinced of the seller's expertise. The correct answer to "how are you different" is "What are you hoping to accomplish?" if the buyer responds with a goal, the seller now has a prospect.

### *12. Emotional decisions are justified by value and logic*

Buying is almost always an emotional act. Depending on the specifics of the situation, those emotions may or may not have to be justified. A non-decision maker will make an emotional decision to buy from a salesperson first, but then should be armed with the logical reasons so that the buying decision can be defended.

### *13. Don't close before the buyer is ready to buy*

Once they close the first time, the seller's relationship with the buyer will never be the same. It will be either better or worse, but it won't be the same. And almost without exception, it will be better if they were ready to buy and worse if they weren't. When management pressures salespeople to close early at the end of the quarter, there's a structural problem, and it's likely that larger future gains are being trade away for smaller near-term gains. Before asking a buyer to buy, sellers should ask themselves:

- Have I documented the buyer's goal(s)?
- Have I diagnosed the buyer's current situation?
- Have I documented how the buyer's goals can be achieved by using my offering?
- Have I helped the buyer cost-justify the decision?
- Have I documented what will happen between signing my order and having our offer fully available for the buyer's use?
- Have I provided the buyer proof that our offering and organization are for real?
- Have I asked the buyer about and mapped out organizational legal review, approved vendor list and so on?

Sometimes, being able to respond to these questions or most of them, with a "yes" helps the salesperson get comfortable with the idea of moving up on his or her timetable for selling.

## **Chapter 5: Defining the Sales Process**

- All salespeople, and in particular traditional salespeople, can become more customer-centric, and can produce at higher, more predictable levels. A traditional seller following a good process is likely to outperform a naturally talented seller who is winging it.
- One of the first tasks is to document, define, and understand all their sales processes. In other words, codify their selling behaviors for the different selling situations they encounter.
- *Some definitions:*
- *Process:* A defined set of repeatable, interrelated activities with outcomes that feed another activity in the process. Each outcome can be measured, so that adjustments can be made to the activities, the outcomes or the process itself.

- *Sales process*: A defined set of repeatable, interrelated activities from market awareness through servicing customers that allows communication of progress to date to others within the company. Each activity has an owner and a standard measurable outcome that provides inputs to other measurable activity. Each result can be assessed, so that improvements can be made to the skills of the people performing the activities and/or the sales process.
- *Sales pipeline milestones*: Measurable events that take place on specific opportunities that enable sales management to assess the quality of activity needed at the salesperson level. Again these milestones are objective and auditable.
- Few companies have sales processes that traditional sellers can execute. The authors believe that this deficiency is the single most important factor contribution to the disappointing results achieved with sales force automation (SFA) and customer relationship management (CRM) system. The chances of building and sustaining an executable and therefore successful sales process are slim in the absence of the following prerequisites:
  - Pipeline milestones
  - Repeatable process - most companies have more than one sales process as one size does not fit all. It can be a recipe for disaster to impose a single sales process on all sales.
  - Sales-Ready Messaging
  - CustomerCentric Selling Skills
  - Consistent input - the majority of input to SFA/CRM systems consists of salespeople's opinions of the outcome of sales calls they make. By definition, this input is subjective and variable.
  - Auditable input -Unless or until milestones have components specific to job title and business goal that can be audited by someone other than the salesperson, input will continue to be variable.
- Even without being instructed to do so by their management team, many traditional salespeople are guilty of closing prematurely, often attempting to close the wrong person. Attempting to close non-decision makers (and close them prematurely) may lead up to losing the transaction because of bad behavior.
- A sales process should contain a specified time to close that was agreed to by the buyer. Senior management can attempt to accelerate orders at their own risk.
- The authors believe that a sales process should create a framework for relating to customers and prospects. It is possible to shape the marketplace's opinion of you by designing a customer-centric process that reflects the way you want your customers and prospects to be treated. The CEO can create a blueprint for customers' experience that will influence the words that salespeople use when developing buyer needs and setting expectations. With equal or even slightly inferior offerings, companies can make the way their salespeople sell a differentiator. These organizations can win on sales process.

- A customer-centric sales process needs to cover all the steps, from market awareness through measuring results achieved by customers. It should define and comprise:
  - When buying cycles begin
  - The steps involved in making a recommendation
  - The steps necessary to have the buyers understand their requirements
  - The steps needed for buyers to understand how your offering addresses their goals and problems
  - An estimated decision date documented to confirm the buyer's agreement
  - Built-in feedback loops, to permit a rapid adjustment to timing issues, competitive pressures, client feedback, and external events (Y2K).
- One way of structuring a sales process is to define an appropriate set of pipeline milestones.
- You can identify milestones by analyzing transactions from the past year or so to determine if you can isolate common factors and patterns in opportunities that you've won and lost. By so doing, it is often possible to identify and incorporate specific best practice events and use them as milestones. This can allow organizations to begin to institutionalize their best practices within a sales process and improve win rates on opportunities in the pipeline.
- These milestones allow salespeople and management to better understand where they are in a given sell cycle. They provide insight into whether opportunities are qualified, and therefore worthy of resources.
- Key steps in every sales process must be documented in order to be auditable. There must be a letter, fax, or email from the salesperson to the buyer that summarizes key conversations.
- Not all milestones need to be auditable. Your goal should be to define those critical ones that allow you (or your sales managers) to grade opportunities. Senior management must take ownership of the customer experience and the corresponding sales process, in part by defining deliverables based on the size and complexity of a given transaction.
- Salespeople tend to resist following a process. They don't like documenting their sales efforts and they like to boast of their successes outside the process.
- Salespeople intuitively know how much needs to be in their pipelines to keep their managers off their backs. When their pipelines are thin, salespeople become less selective about what they are working on.
- The role of salespeople is to *build* pipeline by executing the sales process; the role of manager is to *grade* that pipeline, with an eye toward disqualifying. Managers should own the quality of the opportunities they allow their salespeople to spend time and resources on. By invoking and sticking to a strong sales process, managers should be able to increase the percentage of winnable situations in the pipeline.

- Given a diversity of transactions, many companies find that one size (or process) does not and cannot fit all of their selling situations. The authors suggest defining customer-centric steps and deliverables for your most complex sale, and then determining subsets of steps and deliverables for smaller transactions.
- A sales cycle can be distilled into a series of conversations between the seller and the buyer (s) for each defined step in a sales process. But the emphasis is on the buyer - that is, someone who is qualified and empowered to buy. This means that conversations have to be targeted. Sales-Ready messaging involved defining the titles or functions of people within a prospect whom salespeople will have to call on in order to get their proposed offering sold and installed.
- Once these titles have been identified, a menu of business issues for each title should be developed. Once you have a title and a business objective, you are in a position to have a targeted conversation.
- Another advantage of developing this kind of list is that it can include inputs from more than just the salespeople. People at many levels in the selling organization can contribute. In addition, targeting conversations permits a more consistent positioning of offerings, because the responsibility for positioning no longer falls on the shoulders of the salespeople. And finally, targeting conversations tends to push conversations up higher in the hierarchy - and the higher in the organization a salesperson calls, the shorter the potential menu of business issues, the more predictable the ensuing conversation, and the more likely the sale.
- Most organizations don't quit often enough, or early enough, when the odds are against them. Without a defined sales process, they don't know the odds are against them.
- Responding to RFPs that you did not initiate can be a huge drain on your resources. Consider segmenting your sales process, and investing your limited resources where they'll give you the most return.
- For companies having multiple divisions with independent sales forces, and/or those using value added resellers (VAR's), it may be helpful to take a step back and decide who you want calling, and where. While this seems fundamental, sales organizations tend to evolve over time, and they sometimes get out of touch with a changing reality. A fresh look - a "clean sheet of paper" approach - can be helpful in stepping away from the trees and looking at the forest.
- Just as offerings, markets, and sales situations are dynamic, sales processes too, must be reviewed and adjusted on an ongoing basis, if they are to reflect how your salespeople sell. A review is advisable, and milestones should be either verified or modified by analyzing the results. This may be one as often as quarterly, for a relatively new market or offering, or on an annual basis for mature organizations.

- Consider reviewing your top five wins to highlight best practices in selling. And as unpleasant a task as it may be, review your toughest losses as well, in an attempt to see if your process needs to be changed.
- A sales process represents the management's team's best understanding of how buying cycles take place, and how to fit into those cycles.
- If the potential usages of your offerings are highly variable (i.e., consulting, professional services), process becomes more important.
- Without sales process, every situation is an exception based on the seller's opinion. This can be costly at several levels:
  - Salespeople are determining when and how to compete.
  - Without putting structure around sales situations, selling organizations lack the ability to drill down and better understand the kinds of circumstances that are likely to result in unsuccessful cycles, or conversely, are likely to lead to sales.
- A milestone based roadmap that can be audited is absolutely essential. Sales is less an art, and more a craft. While the design and implementation of an effective sales process are formidable tasks, the upside, having better control over top-line revenue generation, can be absolutely invaluable.

#### **Chapter 6: Integrating the Sales and Marketing Processes.**

- In many cases, the difference between a company that is enjoying success and one that is struggling is the degree of integration and cooperation among the functional departments.
- Tactical marketing's mission is to figure out how to achieve today's revenue targets with today's offerings. The interface between Sales and tactical marketing is often neglected.
- The root cause of the problem between Sales and marketing is a lack of formal awareness and process to gather knowledge about how customers use their offerings to achieve goals, solve problems, and satisfy needs.
- A key component of creating B2B core content is tapping the experience of client's customer service people and professional services people. These are the people who are responsible every day for helping customer use their offerings to do their jobs and satisfy their needs. They have the customer usage knowledge needed to help them create Sales-Ready Messaging.
- In virtually all organizations, Sales and marketing are expected somehow to collaborate. These two functions within an organization ultimately drive top-line revenue, and yet few companies have a working definition of how they are supposed to interact. This overall lack of clearly defined roles and responsibilities contributes to what is frequently a strained relationship.

- Sales and Marketing define, almost exclusively, the company's relationship with its customers, and ultimately are responsible for driving and achieving top-line revenue. Think how much a business could benefit from putting processes in place that would get these two functional silos- traditionally uncooperative - to work together and work for the good of the customer.
- A necessary first step is that Marketing must view itself as the front end of the sales process, rather than the back end of product development. Marketing's objective is to help potential customers understand how they can achieve a goal, solve a problem, or satisfy a need with the company's offerings. Marketing could contribute effectively to the conversations that salespeople have with their prospects and customers.
- Marketing has to learn to face the customer, rather than look toward the lab.
- The first change needs to be a shift of affiliation within the organization. This is primarily a psychological shift, but it can also take many procedural and even physical forms.
- A second step is to formally charge marketing with the responsibility for developing and maintaining the company's core content - in other words, its sales messaging. Sales- Ready Messaging must be created to support targeted conversations with decision makers and decision influencers. It requires product usage information positioned specifically for decision-maker job titles within targeted industries.
- The sales and support teams in the field are closest to the customers and prospects. They have to suggest how messaging tools can be improved and kept up to date. They have to bring back from the field new insights into how offerings are actually used, and not used, by customers.
- Marketing, meanwhile, must own the content. It owns the responsibility for achieving consistency of message and dissemination across multiple channels, multiple product lines, and so on. Adding the responsibility of Sales-Ready Messaging dramatically increases the scope of marketing's job and the authors suggest the title of chief content officer as an appropriate one.
- The Web tends to put marketing directly in touch with buyers. In addition to information dissemination or even order fulfillment, Web sites can be designed to help Marketing learn: "How do you use our products?" "What were you able to accomplish?" "How would you like to use our products in the future?"
- Marketing can be much more effective in providing tools and collateral materials when they have had sustained, iterative contact with the customer base through the Web. They are far better prepared to develop Sales-Ready Messaging to support all the many conversations that add up to effective customer-centric sales process.

- Sales-Ready Messaging means empowering salespeople to have meaningful conversations with decision-makers and decision influencers about how they can achieve a goal, solve a problem, or satisfy a need through the use of the offering. When you combine this core content with sales process, you gain the capability of codifying, or architecting, sales conversations and sales cycles.
- If sales processes can be integrated with marketing processes, which include Sales-Ready Messaging, CEOs can gain control over generating top-line revenue, and organizations can improve their relationships with their customers.

### **Features versus Customer Usage**

- The focus of both salespeople and buyers should be on product usage, not product features.
- A feature is an attribute of a product or service - things like weight, size or color. The primary problem with sellers being taught to lead with features is that this approach counts on the buyer's knowing whether or not the feature is useful and therefore relevant.
- Great salespeople rarely have to close, and great sales calls are conversations, rather than presentations. Customer-centric salespeople are able to translate the feature knowledge they are given by product marketing into usage scenarios. These are simply hypothetical examples that are highly relevant to the buyer and that the seller can use to conduct intelligent conversation.
- Here is an example of adopting a customer-centric approach to cross selling: A couple from Nebraska visited a branch office to open a checking account for their daughter, who would be attending school near the bank. Before working through the specifics of the checking account (as so many salespeople would) the retail banker asked a number of usage-scenario questions. For example: When you are back in Nebraska, would it be useful for you to be able to check your daughter's balance by using the internet? Etc. Through the use of this kind of usage-scenario question, cross selling in the pilot region went up 400 percent.

### **Chapter 8: Creating Sales-Ready Messaging**

- Three conditions must exist in order to have an effective sales conversation about an offering:
  1. The buyer's title and vertical industry must be known.
  2. The buyer must share a business goal or admit a business problem.
  3. The seller's offerings must have capabilities that a targeted buyer can use to achieve a goal, solve a problem, or satisfy a need - and, of course, the seller must understand and articulate these capabilities.

- The higher in the organization you call, the smaller the number of business objectives you are likely to encounter. In general, senior people worry about a finite number of important issues. Conversations with senior management tend to be shorter, more conceptual, and less technical - which in many cases means they're more interesting and productive.
- The authors advocate a top-down approach to sales. The structured approach (that follows) lets salespeople spend far less time with people who can't or are not going to buy.
- Begin by listing your vertical industries. For each industry, make a list of the titles (or functions) of the decision makers and influencers a salesman is likely to call on in order to get your offering sold, funded, and implemented.
- For each of these job titles, what goals or business objectives should they have in that function? Which of these goals are addressable through the use of your offering?
- Every goal on your list should be a business variable that your company's offering can help a particular title achieve. Ideally, the goal should be monetarily based, as the financial benefit of achieving the goal will be used to determine if the cost of the offering can be justified. A business should be willing to spend money to achieve a goal.
- The next step is to begin to develop questioning templates, which are called Solution Development Promoters, or SDPs. It is recommended that Marketing take responsibility for developing and maintaining these materials. They represent the core content of a company's Sales-Ready Messaging, and they give selling organizations the ability to influence the conversations that their salespeople have with buyers.
- The messaging in SDPs takes the form of questions because questions keep salespeople from "telling". See page 109 for a sample template.
- As long as they are asking intelligent questions that their buyer is capable of answering, they are not selling (at least in the buyer's mind). They are consulting.
- The role of the salesperson is to become a buying facilitator by leading the buyer with questions that are biased toward their particular offering.
- The next step is to position your offerings. Identify all the features that could be used to achieve a goal and then distill them down to your top four.
- To convert features into usage scenarios there are four components:
  1. *Event*: the circumstance causing a need for the specific feature.
  2. *Question*: Asking versus telling doesn't feel like selling to the buyer.
  3. *Player*: Who (or what system) will take action to respond to the event.
  4. *Action*: How can the feature be used, stated in terms buyers can understand and relate to their job title. The description of the action should be specific enough so buyers can visualize how the result will be achieved. Terms used in

a call with a CIO, for example, would be different from those used when calling on a CFO.

- The next step would be to sequence these usage scenarios. This is usually driven by the order in which the buyer would be likely to encounter them.
- For each usage scenario we now create corresponding best practice diagnostic questions for the salesperson to ask in order to determine if the buyer has a need for the usage scenario described in the "event, question, player, action" (EQPA) question.
- SDPs would be created for each remaining goal on the menu for a job title. After that, this same process would be repeated for each title/menu that is specific to an offering and vertical title. The final result is Sales-Ready messaging to enable sellers to have targeted conversations with the titles needed to sell, fund, and implement a system.
- While this takes significant effort the result is well worth it. If they are properly prepared, SDPs provide a more consistent positioning of offerings by all salespeople, and should help your sales effort overall.
- A few other observations about creating SDPs:
  - They get easier to prepare after the initial ones because usage scenarios tend to be reusable for multiple targeted conversations. While marketing should take responsibility for the creation and maintenance of SDPs, it also requires significant involvement from the sales organization.
  - The true test of an SDP is whether it can be used when making a call - if not, salesmen should provide feedback on how it needs to be modified.
  - Limit the number of usage scenarios to be four.
  - A single usage scenario may require integration of multiple products.
  - SDPs are indexed by vertical market, title, and business goals and objectives; therefore they are geared more toward management discussions, than toward presentations.
  - Whenever possible, SDPs should bias buyers toward usage scenarios that represent a company's strengths against competitors that either are in the account today or are likely to be invited to compete at a later time.
  - SDPs should be developed for offerings besides product. SDPs are dynamic not static, and must be maintained and updated over time.
  - New product or service announcements should be accompanied by (even preceded by) the preparation of SDPs.
  - Outside help may be necessary, in preparing SDPs.
  - With salespeople directed to higher levels, qualification becomes easier.

## **Chapter 9: Marketing's Role in Demand Creation**

- Marketing can play a critical role in creating demand for a company's offerings. If marketing is going to serve as the front end of sales cycles, then its messages across all media should be consistent with the salesperson behavior the authors

espouse: namely, leading with business issues with people who can make decisions and allocated unbudgeted funds.

- Marketing should be the keeper of Sales-Ready Messaging, but should not be expected to accomplish this in a vacuum. Sales should provide constructive input, continuing to fine tune material so that it reflects best practices in the field.
- Marketing and sales have to agree on the definition of a lead. A legitimate lead contains three components: vertical industry, title and goal.
- There are only a certain number of people out there who are already looking to change. Chances are they already have a preferred vendor in mind. Demand generation entails causing people who weren't looking to change to begin a buying cycle. This segment represents many times the potential number of people who are already looking, and offers the advantage of allowing salespeople to be proactive and become the vendor of choice instead of being reactive and competing for second place.
- People who are not already looking to change have no budget allocated, so the focus in those organizations should be on people who have the authority to free up unbudgeted funds.
- Whether you are designing advertising campaigns, participating in trade shows, or putting on seminars, you should begin with the end in mind: creating qualified leads for the sales organization.
- Few companies have a working definition of the interrelationship between Sales and marketing. Companies implementing CustomerCentric Selling embrace the following description of each function's role:
  - Marketing, through its programs, is responsible for getting buyers who are not currently looking to change to consider looking. Marketing is also the keeper of the tools needed to take a businessperson from a goal to a vision of a solution.
  - Salespeople execute the sales process using Sales-Ready Messaging. In doing so, they are responsible for documenting calls so that sales managers can audit and grade the opportunities in the pipeline.

## **Chapter 10: Business Development**

- Many territory salespeople rely almost exclusively on the telephone when attempting to uncover new opportunities, and while the telephone offers the advantage of minimal time and effort up front, studies suggest that it is not a very effective way of contacting executives.
- Salespeople have to cover their territories with additional methods, beyond phone calling. These methods include referrals, letters, faxes, emails, recommendations, and seminars on an ongoing basis.
- Written correspondence prior to making phone contact can dramatically increase your chances of getting through on the phone and uncovering new opportunities.

- Email is the least effective way to make an initial contact in writing. If an executive (or assistant) doesn't recognize the email address of the sender, the chances that the message will be opened and read are small. The title of the email becomes extremely important: It must be scripted very tightly to generate enough interest, perhaps even indicating that some research about the target company has been done, although space is limited.
- Although letters can be effective, they face multiple barriers: getting opened, read, passed along, and saved and so on. Letter campaigns take time, can incur expense in processing and tracking, and usually involve a delay before follow-ups can be done.
- Faxes offer similar advantages. With the advent of email, scanning and attaching documents to emails, the number of faxes being received has dramatically decreased. This is an advantage. Sending a letter by fax is an effective way to improve the odds of gaining a conversation with the target title. One of the advantages of this approach is that if the executive's assistant sees the fax, he or she gets a clear idea of what you would like to discuss. If the assistant feels some of the items are of interest, the fax provides Sales-Ready Messaging to help him or her explain why a phone conversation may be warranted.

#### **Developing Buyer Vision through Sales-Ready Messaging**

- Once a buyer has shared a goal, start with a framing question beginning with the words: "How do you \_\_\_\_\_ today?" It is a logical, safe question that is virtually guaranteed to get buyers to describe their current process, which is exactly where a CustomerCentric salesperson wants to go.
- Once a buyer has responded, it is time to follow up with diagnostic questions, ideally biased toward usage scenarios that your offering provides. In order to accomplish this, start with the end in mind.
- These diagnostic questions are now used to discover which usage scenarios the buyer is likely (and unlikely) to want. The salesperson follows up with the buyer by asking the questions in a sequence that flows within the call, takes detailed notes, and - when finishing the diagnosis - does a summary to make sure both the buyer and the seller are on the same page.
- There is no right or wrong way to navigate an SDP, provided a seller can end with a question to verify the buyer's vision. Given a choice, do the diagnosis (left side) first, but the primary consideration is being in alignment with the buyer. If a buyer already knows what he or she wants, begin with the usage scenario question.
- The purpose of the Solution Development Prompter is to arm sellers with artificial patience and artificial intelligence to determine which usage scenarios the buyer is likely to need, simply by asking questions. These usage scenarios become capabilities when the buyer when the buyer agrees they would be useful. The final step is to see if b using all the capabilities, the buyer would be empowered to achieve the

desired goal. This is accomplished by asking, "If you had (summarize the capabilities), then could you achieve (buyer goal)?"

- Once a buyer vision has been created you should see if the buyer will share any additional goals, so you can create further visions and develop associated value. After developing shared buyer goals, the next step is to begin qualifying the buyer - a critical requirement in successful selling.

## Chapter 12: Qualifying Buyers

- Many organizations have great difficulty forecasting top line revenues. This reflects an underlying problem: Pipelines are full of unqualified buyers. Most organizations have no standard way of accurately assessing which prospects are likely to buy.
- The sales manager should disqualify buyers, based on the best available correspondence between the salesperson and the prospect.
- A prerequisite is to agree on a standard set of terms describing the Key Players involved in making decisions. This facilitates qualifying multiple Key Players who play different roles in a given opportunity. A prospect with all roles filled is a better bet at forecasting time.
  - *Key Players* are defined as those individuals whom a seller must access in order to sell, fund and implement the offering. The number of Key Players is proportional to the size and complexity of what is being sold. Here are the definitions:
  - *Coaches* want the seller to win the business, and are willing to assist with information and inside selling, but they have limited authority within the organization.
  - *Decision makers* can make the vendor selection and free up unbudgeted funds. They can commit internal resources to evaluate a seller's offerings.
  - *Financial approvers* are those who must sign off on expenditures — either by rubber-stamping a purchase or by being actively involved in the purchasing process.
  - *Users and managers of users* can provide a groundswell of support with the rank-and-file members of a given organization.
  - *Implementers* are responsible for migrating from the current method or environment to the new offering. They often prefer to work with vendors who offer professional services and ongoing support.
  - *Adversaries* are individuals who either do not want to change, want to control change internally, or want to do business with a competitor
- Salespeople tend to avoid their Adversaries, which is generally a mistake. A salesperson's objective should be to convert, neutralize or eliminate Adversaries.
- One key element in the qualification process is to identify and reinforce a Champion. When the salesperson is calling high, the Champion will often be self-nominating. He or she will volunteer access to key Players.

- Once the answers to the debriefing questions have been edited and approved, the seller now composes a Champion Letter. The Champion Letter, fax, or email serves four important roles: This Champion letter should:
  - Provide a sanity check for salespeople to verify they understand the buyer's goals, situation and vision.
  - It allows the manager to audit a salesperson's achievement of milestones to see if a prospect is worthy of being in the pipeline.
  - Serve as a reminder to the buyer of a previous conversation with the salesperson.
  - Facilitate internal selling by providing the Champion with prospect-ready messaging.
- Once a Champion letter has been sent, the salesperson must follow up on that communication in order to get the buyer's agreement to the following points:
  - The letter accurately summarizes their conversation(s).
  - The buyer is willing and able to provide access to the appropriate Key Players.
  - After interviewing all Key Players, there will be a chance to gain consensus that further evaluation is warranted.
- If access is not forthcoming, it is important to figure out what's really going on: is the Champion unable to provide access, or unwilling? If a prospect is unable to obtain access to decision makers, the salesperson needs to ask who could provide that access. If a prospect persists in being unwilling to grant access, the sales manager should be involved in making the decision as to whether or not to keep competing for the sale.
- Phone conversations or face-to-face sales calls should be scheduled once the Champion has agreed to provide access to Key Players. When meeting with Key Players, the salesperson should make sure everyone understands the potential benefits to the organization, should they agree to buy.
- The objective in decision maker and Key Player calls is to briefly introduce yourself and your organization, summarize the previous calls made within the account, give the buyer an opportunity to share his or her goals, diagnose each, create visions, and establish value. Preparation is vitally important.
- As early as possible in the buying cycle, the salesperson should conduct meetings with all Key Players. This accomplishes several objectives:
  - Everyone understands the potential benefits to the organization.
  - Getting everyone involved can often result in larger payback and therefore justify potentially larger transactions.
  - It provides the seller with multiple points of contact in the organization, which can be helpful if one of those players leaves the prospective company.
  - If there is a strong Adversary, he or she will be identified early enough for the seller to determine how to best circumnavigate him or her. If the

Adversary is strong enough to withstand these efforts, the seller may make the decision to withdraw from the sale, rather than go the distance and lose.

- This is a reality check
- Like the Champion calls, these calls on Key Players should be documented. Whenever a new goal is shared, the equivalent of a champion letter should be generated.

### **Chapter 13: Negotiating and Managing a Sequence of Events**

- By agreeing to and adhering to a Sequence of Events, the salesperson provides documentation that allows sales management to continue auditing and grading opportunities. This removes overoptimistic opinions from the forecast and minimizes the phenomenon of salespeople "selling" their managers on how good the pipeline is.
- When they make their forecasts, sales managers should have the benefit of a piece of paper that shows a printed Sequence of Events for each potential sale, and what progress has been made in that sequence.
- When documented by means of a clearly stated Sequence of Events, the process of controlling a sales cycle begins to resemble project management. The decision process embedded in a sales cycle has a defined beginning and end, and the selling organization has the ability to assess progress and probabilities of success throughout.
- In addition, when the seller handles sales cycles in a highly professional manner, buyers are likely to conclude that the selling organization's implementation will be professional as well.
- Salespeople and the companies they represent can make the *way* they sell a competitive advantage and a differentiator.
- Most typically, the Sequence of Events will serve as a road map, but will tend to be a living document. About once a month it may need to be republished to reflect any alterations that need to be made either to the events or to the timing of events. Once this process is in place, sales managers enjoy several potential benefits:
  - They can coach people through the process step by step.
  - Planning for allocation of resources can be done.
  - Each checkpoint the buyer agrees to further validate the buyer's commitment and increases the likelihood of a successful completion.
  - Sales managers have the ability to assess (disqualify) opportunities if they do not appear to be winnable.
  - It is unlikely that buyers looking for competitive bidders to a chosen resource would commit to a Sequence of Events with a runner up.
  - It is far easier to forecast close dates because buyers have agreed to tentative dates for delivery of a proposal and a decision. This helps take vendors away from the tendency to lose based on their agendas.

- The right time to close is when a Sequence of Events has been completed to the buyer's satisfaction and the seller's satisfaction.
- Negotiating the steps in the buying cycle enables all committee members of the selling organization to be on board with the stated objective of determining if the offerings can satisfy the overall needs of the prospect. As soon as this doesn't appear to be possible, either party can opt out of expending further resources.

#### **Chapter 14: Negotiation: The Final Hurdle**

- Most sellers will tell you they are outstanding negotiators — even if their approach to “negotiating” is to keep discounting until the buyer says, “Yes.” If a sales cycle has been executed properly, though, the close should be a logical conclusion, rather than an arm wrestling contest or a fire sale.
- When it comes to negotiating, there are no magic bullets. The salesperson has to be prepared and has to stick to the game plan. A misstep can cause serious damage.
- If salespeople fail to establish value and earn the respect of the Key Players as peers, for example, the buyer has the upper hand when it comes time to negotiate. If the seller has been subordinate throughout the sales cycle, giving whatever the buyer requests and getting nothing in return, then the buyer will have the upper hand when the subject of price arises.

Preparation includes these key components:

- Verify that you are the vendor of choice, and that price is the only obstacle to doing business. Sellers, on their own, often have trouble verifying they are the first choice. This is just how the buyer wants it — to put the seller in a perceived competition with other sellers.
- Make sure that you are negotiating with a decision maker. If you are not, you can consider any concessions you make to be mere starting points for when the real decision maker comes into the picture.
- Posture by using polite “no” questions to respond to requests for better pricing. Some examples of these questions might be, “Is there anything you would like to take out of the agreement?” or, perhaps, “We’ve spent a lot of time discussing how to [remedy a problem or help achieve a goal]. Has anything changed?” Some buyers will agree to go forward after one, two or three of these polite “no” questions. This posturing provides artificial patience during a stressful point, maximizing the possibility of a profitable transaction.
- Ask the buyer whether the “get” you want is possible. Establish an atmosphere of quid pro quo. Prior to giving, the seller should first ask for something from the buyer. If the seller offers a concession, the buyer will take it and still want a lower price. Also, the psychology is to convince the buyer that he or she is getting the best possible deal. If the buyer makes the first concession, the seller's concessions appear even more valuable.

- Offer your conditional “give” and be prepared to walk if the offer does not close at that point. Leave the door open for further rounds, but only after taking your concession off the table. There are many things a seller can ask for — money up front, a larger transaction or a longer commitment, and even an introduction to another department, enabling the seller to pursue more business.

**Recommendation:** Even if you’re a successful salesperson, CustomerCentric Selling can make you even better. Better in that you will start thinking in terms of your buyers and their goals, problems, and needs. I particularly liked Sales-Ready Messaging to ensure that your approach is both meaningful and on target.



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My associates and I specialize in and have a passion for working with successful accounting firms. Our concentration is on what are commonly called the “soft skills.” Through our experience we have demonstrated that what is true for Fortune 500 companies is also true in creating a competitive advantage for accounting firms.

We specialize in working with those firms who want a competitive advantage in recruiting prime talent, retaining their key employees and developing their partners, managers and staff. Frumi & Associates provides a formal measurable coaching program to address the specialized needs of growing firms.

Unlike other coaching firms our associates all have an intimate knowledge of the accounting profession and the challenges they face.