



**Socratic Selling**  
**How to Ask the Questions that Get the Sale**

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**Author's Bio:** Kevin Daley is president and CEO of Communispond - the world's largest training company in personal communication skills. Kevin's crowning achievement is the Socratic Skills Program, which incorporates his selling philosophy and experience. Emmett Wolfe is Senior Vice President of Communispond.

**Author's big thought:** By their own admission most salespeople talk too much. Too few "Socratically" help customers draw the logical conclusions to buy what is proposed to them. The Socratic approach respects the power of the customer; the customer has the need, the power, and the decision-making authority. *Socratic Selling* shows the reader how to access that power, to cooperate with it, and to flow toward the salesperson.

**Part I**

**Taking a Socratic Approach**

**Chapter One: Salespeople, Think about Change**

- As corporations compete today, new responsibilities are thrust upon buyers, and buyers respond with a new set of needs, skills, and expectations. Today's buyer doesn't want to be talked at. Today's buyer wants to be heard. The salesperson who got by, or even became successful, by talking and not listening, will not succeed with this new customer. Today's salesperson needs to learn who this new customer is.

**Chapter Two: Careful, This is a Lion**

- In the world of selling, the customer is the lion.

- In today's corporation, many buyers are a key source of information to the rest of the company. The buyer's knowledge contributes to recordkeeping and inventory control. Buyers attend trade shows and conventions, where they network within their industry—and outside it.
- Corporate buyers know what's coming in the market; they know what options and customized editions are about to become standard and thereby advance the product.
- You can see the increasing knowledge of buyers from the questions they ask: about credit options, physical packaging, marketing help or publicity to support their purchase, designated deliverers of a service, customization, scheduled modifications or improvements, alternative features, user education, guarantees, extended warranty. Because of their knowledge, today's buyer is no longer merely a conduit from the decision maker to the supplier. The buyer is a key part of the decision-making process.
- Dialogue is needed because a dialogue is, first, a purposeful discussion. The sales process brings together two people, each with purpose that will be better defined in the dialogue itself. Besides clarifying goals, a dialogue refines the information that each party contributes. The customer and salesperson each bring a key asset to the process: the customer knows the history and needs of the organization. The salesperson knows the potential of certain products or services to give that customer a solution.
- Not any kind of dialogue will suffice to fuse these assets into a solution. The dialogue needs a defined method with a record of success.

### **Chapter Three: This Method Makes Both Flayers Win**

#### **What is the Socratic Method?**

- The Socratic method: A method of teaching or discussion, as used by Socrates, in which one asks a series of easily answered questions that inevitably lead the answerer to a logical conclusion.
- The Socratic Method treats the other party in a dialogue deferentially. Socrates' approach is attentive to the other party's perceptions. It is as if the other parties were a lion. There is a realization that the case cannot be forced, but rather that much is be gained by enlisting the lion's power.
- *Socratic principle 1: respect the customer*
- *Socratic principle 2: help the customer think*
- The Socratic approach uses two closely connected dialogue tools: easily answered questions and full-value listening to the customer's answers. Easily answered questions are a hallmark of the Socratic Method. They are the great facilitators.
- Full-value listening means crediting the customer's answers to your questions with the impact those answers have as information.
- *Socratic principle 3: help the customer make decisions.* The Socratic process generates a series of logical conclusions that shape the sale.

- The approach goes step by step, through a series of decisions made by the customer.
- For those decisions to be made, salesperson and customer need a clear-headed dialogue. Gradually, the customer concludes that you know the customer's business and that you can be trusted to work in the customer's interest. Those conclusions lead to a final conclusion—to buy from you because it makes sense to do so. The outcome is a result of the integrity of the process.

## **PART II:**

### **Opening the Sale Socratically**

#### **Chapter Four; It's the Customer's Meeting**

The typical openers

1. Begin with a sales presentation.
2. Begin by talking about your company and its products.
3. Begin by asking questions.
  - Control overlooks a reality: In the customer's mind, the meeting is about the customer. If there is any doubt why the customer thinks the meeting is about the customer, consider who the customer is.
  - The Customer is in charge - There's no doubt who is in charge.
  - The customer wants to speak - Speaking defines what happens at a meeting. Customers, then, establish the lines of authority in the meeting by speaking.
  - The customer has the information - By speaking the customer fills the information void created by your presence.
  - Unless the customer sees you making an effort to understand that perspective, the customer sees you as self-serving. As an outsider, you are knocking on the door with your mind packed with guesses, eager to act on a set of assumptions that bypasses the most reliable source of information—the customer.
  - You need a way into the customer's world - Your products and services might help the customer's world go forward—that's a view the customer shares—but at the moment of entry to that process, the customer sees you as unprepared and unequipped. You must first remove that perception and then gain the cooperation of the one person who makes the sale happen.
  - The difficulty of entering the customer's world is gigantic. Many salespeople try to break through at the outset without an effective method. Without a method for beginning, approaching this lion has potential for disaster.

#### **Chapter Five: Begin Where the Customer Begins**

Begin with a Socratic opener:

1. Say you are prepared.

"Mr. Jones, I'm prepared to talk about \_\_\_\_\_, which we discussed on the phone..."

2. Invite the customer to speak on subject.

"If you could give me your perspective on that..."

3. Offer an immediate benefit.

"We can focus the meeting on what interests you."

Every customer has a perspective on a subject and is only too happy to share it. Ask.

## **Chapter Six: Help the Customer Tell the Need Story**

The customer owns the past.

The customer has no stake in the future—until the past has been dealt with.

Help the customer tell the story.

1. Use Socratic draw probes:

- "Tell me more about..."
- "Would you elaborate on..."
- "Give me an example of . . ."
- "What else should I know about ..."
- "What else would help me understand . . ."

2. Use Socratic access probes:

"How does \_\_\_\_\_ fit the picture?"

"Talk to me about your experience with \_\_\_\_\_?"

"How do you handle \_\_\_\_\_?"

Believe that the sale is being made when the customer speaks about the need. Not one moment is wasted.

## **PART III**

### **Advancing the Sale Socratically**

#### **Chapter Seven: Find Out Why Now**

The clock runs faster on the customer.

Ask easily answered questions about urgency.

- "Why now?"
- "What makes this urgent?"
- "Why is this important right now?"

Take advantage of the highly visible deadlines.

- Seasonal deadlines
- Phase completion deadlines

Watch for the less visible deadlines.

- Start-up deadlines
- New broom deadlines

- Unspent budget deadlines

The customer's second need is a solution.

Customer's first need is to get started on a solution.

### **Chapter Eight: Let Feelings Drive the Sale**

Facts about the need determine the choice of product or service.

The customer's feelings determine the buying decision.

Ask easily answered questions about feelings.

1. For irritants:
  - "What bothers you most about this?"
  - "I sense you're frustrated by this....."
  - "How tough a position does this put you in?"
2. For motivators:
  - "How does this affect you?"
  - "I sense this means a lot to you."
  - "Why is this important to you..."

Sales are closed through what the customer feels.

### **Chapter Nine: The Sharpest Competitive Edge Listening**

The sharpest competitive edge is the one your competitors neglect.

- The customer needs to know you understand.
- Listening fosters lasting relationships.
- Listening fosters unbeatable relationships.

You haven't listened until you can show you have listened.

1. Play back a summary of the facts.
  - If you don't get it right, the customer is happy to help you try again.
  - A playback draws fresh information.
2. Play back the person.
  - Ask yourself, what is important to the customer?
  - If the customer has feelings about it, the person is involved.

Ask easily answered questions:

- "How does that sound?"
- "Do I have it right?"
- "Am I getting the picture?"
- "Is that it?"

When you play back what is important to the customer, you capture the person of the customer.

### **Chapter Ten: Get the Customer Started on Decisions**

Ask easily answered questions to elicit decisions:

*Lead-in:*

If you were to go ahead with....

*Specific decision:*

- when would you...
- how many would you...
- where would you . . .
- what kind would you
- and so on.

To reduce pressure, build fantasy components into the question.

- Use conditional words {If, were to, would}.
- Exclude I or we.
- Exclude your brand name and your company name.

Support the customer's conditional decisions.

- Use brief playbacks.
- Make comments that show acceptance.

Events paint the picture of the past decisions, the picture of the future.

Responsibility begins in seeing the future.

### **Chapter Eleven: Make a "No Surprises Proposal"**

Make a "no surprises" proposal. Gather momentum with a summary:

"Let me summarize what I heard you say ..."

- Facts that describe needs or opportunities.
  - Feelings connected to:
  - Time urgency
  - Irritants
  - Pressure motivators
  - Success motivators
- Conditional decisions made by the customer.

Get approval with an easily answered question:

"How does that sound?"

Make a recommendation: "I would like to make a recommendation based on what you've told me.

- Tie the recommendation to benefits.
- Choose evidence that fits the customer.

Ask for agreement with an easily answered question:

"What's your reaction?"

Proposals that fit are ready for agreement.

## **Part IV**

### **Closing the Sale Socratically**

#### **Chapter Twelve: Know the Question before You Answer:**

The customer's question may introduce a topic of interest. Draw out the customer's interest before attempting to answer in detail.

1. Give a brief, general answer to the question.
2. Use an easily answered question to draw out more detail:
  - "Why do you ask?"
  - "What are you interested in discussing?"
  - "Tell me more about..."

Never miss a topic the customer wants to introduce.

Never miss a chance to help the customer think.

#### **Chapter Thirteen: Go behind the Objection**

You don't understand the objection you hear. To handle it socratically, go behind the objection.

1. Make the objection specific.
2. Probe for the concern behind the objection.
  - Play back the objection in a word or two.
  - Ask easily answered questions.
    - "Please tell me exactly what you mean."
    - "Why do you say that?"
    - "How did you arrive at that?"

When you don't know what the customer is talking about, you don't know what you're talking about.

#### **Chapter Fourteen: Get Ready to Negotiate Objections**

Know your value to the customer.

- You are a reliable resource.
- The customer has invested time in you.
- You offer a valuable product or service.

Know all the objections before negotiating.

- Don't give away what you can trade for.
- Don't get stuck with what you can't give.

Ask an easily answered "suppose question",  
*"Suppose we were able to resolve this issue. I know it's not resolved right now, but just suppose we could. Are there any other issues standing in the way of our doing business?"*

Never underestimate the impression you make upon the customer in a Socratic dialogue.

### **Chapter Fifteen: Negotiate the Get-Give Way**

The customer wants changes. Start by expanding the options.

- Make a get list.
- Make a give list.

Decline and explain.

- Decline the changes that take you beyond your stopping point.
- Explain your rationale for stopping. "Let me explain why that's further than I can go."

Ask an easily answered question to introduce a counteroffer:  
"Would you like to discuss what I think might work?"

Make a get-give counteroffer:

"If you (do this), then I will (do that)."

Don't negotiate just to get the sale.

Negotiate to upgrade the sale for yourself and the customer.

### **Chapter Sixteen: Close with the Calendar**

Help the customer make the buying decision.

1. Regain momentum by summarizing.
2. Make a calendar statement.

"In order to do this for you, let's get out our calendars and schedule the next steps."

3. Specify the next steps.
  - Actions the customer offers to take.
  - Actions the customer wants you to take.
  - Actions you offer to take.
  - Actions you want the customer to take.

Attach dates to all action steps.

Time is the recorder of responsibility. Close on a point in time.

**Recommendation:** This is a common sense method of selling based on asking questions and creating a good customer experience.

**About the reviewer: Frumi Rachel Barr, MBA, Ph.D**

Are you talking about what really matters? If not, consider bringing Frumi in to your organization as she goes where others fear to tread. Frumi is a trusted advisor and leadership coach. She has a passion for helping business leaders, especially entrepreneurs and financial services leaders. She helps them find clarity out of chaos, communicate effectively with their teams, and accelerate their business results. Frumi is a former CEO and CFO herself and has an MBA and a PhD in business administration. She is known as a catalyst for change and when Frumi shows up with dynamite and band aids, change is bound to happen!



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Dear Fellow Reader,

I know how much time it takes to read a book and how many books are sitting on the pile, ready to be read. I don't know about you, but after a while they started to make me feel guilty. I wondered when I would read all the books that I knew would make me feel better informed.

There was also another challenge that I encountered with reading a lot - all the books I read started to blend together in my mind and I couldn't remember what I read in which book. That's why I thought book summaries were a good idea. I could read many more book summaries than I ever could books. I started writing summaries on the books that I read so I could revisit them and remember what I read and where.

Then I started sharing my book notes with all the people I knew. My clients love to hear about what I have read so that they too can learn. That's how a joint journey of learning about leadership, making difficult decisions, knowing how to have tough conversations and many other things began.

I was inspired to start a community of learning and that's when sharing my book notes and starting a book club by teleconference was born.

Reading the RIGHT books and discussing them in the RIGHT way in the RIGHT forum can enhance your leadership skills and communication abilities. Frumi's LEADERSHIP BOOK CLUB can be your ongoing resource!

Go to [www.frumi.com](http://www.frumi.com) and join the discussion forum now!